

University of North Texas Health Science Center 2014-2015 Primary Care Loan Application

STUDENT INFORMATION

Name:	UNTHSC ID:
Telephone (include area code):	Email:

The Primary Care Loan program provides long-term, low interest rate loans to full-time, financially needy students to pursue a degree in allopathic or osteopathic medicine. At UNTHSC, 1st, 2nd and 3rd year DO students are eligible for awards of \$10,000. 4th year DO students are eligible for awards of \$20,000.

Health Resources and Services Administration (HRSA) Required Criteria

- Must be a U. S. citizen or eligible non-citizen
- Enrolled full-time at a program leading to doctor of medicine or doctor of osteopathy
- In good academic standing (making satisfactory academic progress)
- Have submitted a 2014-2015 FAFSA (completed online at <http://www.fafsa.ed.gov/>)
- Demonstrate financial need and provide financial information about your parents (independent students do not have to provide parental financial information, but must be at least 24 years of age and must provide documentation showing you have been independent for a minimum of 3 years). *Note: HRSA dependency guidelines differ from the Department of Education/FAFSA.*
- Registered with Selective Service if required by law
- Medical students receiving a Primary Care Loan must agree to:
 - Enter and complete residency training in primary care within four years after graduation and
 - Practice in primary care for the life of the loan

Primary Care: Acceptable Specialties	Non-Primary Care: Unacceptable Specialties
Clinical Preventive Medicine	Cardiology
Occupational Medicine	Gastroenterology
Public Health	Obstetrics/Gynecology
Public Policy Fellowship	Surgery
Senior Residencies in one of the above	Dermatology
Faculty administrators / policy makers certified in one of the primary health care disciplines	Radiology
Geriatrics	Rehabilitation Medicine
Adolescent Medicine	Psychiatry
Adolescent Pediatrics	Emergency Medicine
Sports Medicine	

HRSA Dependency Status Guidelines

Please determine whether you are considered “dependent” or “independent” according to HRSA guidelines based on the definitions provided in A and B below. Then submit the required attachments for your dependency status.

A. Dependent Student Definition:

If you **were not** 24 years old as of June 1, 2014 **OR** your parent(s) **claimed you** as a dependent on their 2011, 2012 or 2013 tax returns, you must provide parental tax return transcripts for 2013 along with the Dependent Verification Form. (Example: You are 25 years old and your parent claimed you as a dependent in 2011, you are considered “dependent” and must provide a parental tax return transcript.)

Based on HRSA’s definition above, I am a DEPENDENT STUDENT. Check one: ____ Yes ____ No
If “Yes” submit the required attachments below. If “No”, go to Part B.

REQUIRED ATTACHMENTS

- ☐ Parents’ IRS tax return transcript for **2013** is attached. Tax returns will not be accepted.

- ☐ My **2013** Federal taxes were filed and the IRS data retrieval tool was used to complete the 2014-2015 FAFSA.* _____
 - **OR-** My **2013** Federal tax return transcript is attached.* _____
 - **OR-** I was not required to file and did not file taxes for **2013**. _____ (Attach non-tax filer statement.)
 *If you are married, please provide all 2013W-2 forms along with your tax return transcript.
- ☐ HRSA Dependent Verification Form with student and parent(s) signatures is attached.

B. Independent Student Definition:

If you were 24 years old as of June 1, 2014 AND you were not claimed as a dependent on a parental tax return in 2011, 2012 and 2013, please submit your previous three years of tax returns transcripts.

Based on HRSA's definition above, I am an INDEPENDENT STUDENT. Check one: _____ Yes _____ No
If "Yes" submit the required attachments below.

REQUIRED ATTACHMENTS

- ☐ My **2013** Federal taxes were filed and the IRS data retrieval tool was used to complete the 2014-2015 FAFSA. _____
 - **OR-** My **2013** Federal tax return transcript is attached. _____
 - **OR-** I was not required to file and did not file taxes for **2013**. _____ (Attach non-tax filer statement.)
- ☐ My **2012** Federal taxes were filed and the IRS data retrieval tool was used to complete the 2013-2014 FAFSA. _____
 - **OR-** My **2012** Federal tax return transcript is attached. _____
 - **OR-** I was not required to file and did not file taxes for **2012**. _____ (Attach non-tax filer statement.)
- ☐ My **2011** Federal tax return transcript is attached. _____
 - **OR-** I was not required to file and did not file taxes for **2011**. _____ (Attach non-tax filer statement.)
- ☐ HRSA Independent Verification Form with student (and spouse) signature(s) is attached.

CERTIFICATION

By signing below, I certify that all the information contained on this form is complete and correct and I have read and understand my responsibilities under this agreement. I certify that I intend to enter and complete residency training in primary care within four years after graduation and practice in primary care for the life of the loan.

Student Signature

Date

X _____

Please return application and all required documentation **WITH YOUR ORIGINAL SIGNATURE** to
 UNTHSC Financial Aid Office
 3500 Camp Bowie Blvd.
 Fort Worth, TX 76107
 817-735-2505

INCOMPLETE APPLICATIONS WILL NOT BE ACCEPTED.

University of North Texas Health Science Center Non-Tax Filer Statement

This form is to be completed by the applicant if he/she has not filed and is not required to file a tax return for 2011, 2012 or 2013. Tax returns include the IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return.

Student Information

- ☐ **2013 Non-Tax Filer Statement:** I, _____, hereby certify that I (and my spouse, if appropriate) have not filed and am not required to file a 2013 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If I had no income, I have written "None" under Sources of Income.
- ☐ **2012 Non-Tax Filer Statement:** I, _____, hereby certify that I (and my spouse, if appropriate) have not filed and am not required to file a 2012 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If I had no income, I have written "None" under Sources of Income.
- ☐ **2011 Non-Tax Filer Statement:** I, _____, hereby certify that I (and my spouse, if appropriate) have not filed and am not required to file a 2011 IRS Form 1040, 1040A, 1040EZ, a tax return from Puerto Rico or a foreign income tax return. If I had no income, I have written "None" under Sources of Income.

Signatures

Student _____	Date _____
X	
Spouse _____	Date _____
X	

Sources of Income

List total amount of income received from each source. If no income was received, write "None". Also, attach copies of all W-2 forms.

<i>Tax Year 2011, 2012 or 2013</i>	<i>Source or Type of Income</i>	<i>Yearly Amount</i>	<i>Designate Student or Spouse</i>
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

Please return application and all required documentation to
UNTHSC Financial Aid Office
3500 Camp Bowie Blvd.
Fort Worth, TX 76107
817-735-2505

2014–2015 Verification Worksheet Independent Student (HRSA Definition)

Your 2014–2015 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you reported on your FAFSA. To verify that you provided correct information the financial aid administrator at your school will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid administrator at your school. Your school may ask for additional information. If you have questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

A. Independent Student's Information

Student's Last Name	Student's First Name	Student's M.I.	Student's Social Security Number
Student's Street Address (include apt. no.)			Student's Date of Birth
City	State	Zip Code	Student's Email Address
Student's Home Phone Number (include area code)			Student's Alternate or Cell Phone Number

B. Independent Student's Family Information

List below the people in your household. Include:

- Yourself.
- Your spouse, if you are married.
- Your children, if any, if you will provide more than half of their support from July 1, 2014, through June 30, 2015 (if child resides in your household).
- Other people if they now live with you and you provide more than half of their support and will continue to provide more than half of their support through June 30, 2015.

Include the name of the college for any household member who will be enrolled at least half time, in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2014, and June 30, 2015. *If more space is needed, attach a separate page with your name and Social Security Number at the top.*

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time
<i>Marty Jones(example)</i>	<i>28</i>	<i>Wife</i>	<i>Central University</i>	<i>Yes</i>
		<i>Self</i>		

Student's Name: _____ SSN: _____

C. Independent Student's Income Information to Be Verified

1. TAX RETURN FILERS—**Important Note:** *If you, and/or your spouse, amend your tax return for any reason, you will need to submit both a 2013 Federal Tax Return Transcript and a 2013 Federal Tax Account Transcript.*

Instructions: Complete this section if you, the student, filed or will file a 2013 income tax return with the IRS. *The best way to verify income is by using the IRS Data Retrieval Tool 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 Data Retrieval Tool to transfer 2013 IRS income tax information into your FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about when, or how to use the IRS Data Retrieval Tool see your financial aid administrator.*

Check the box that applies:

- ☐ I, the student, have used the IRS Data Retrieval Tool in FAFSA on the Web to transfer my (and, if married, my spouse's) 2013 IRS income information into my FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *Your school will use the IRS information that was transferred in the verification process.*
- ☐ I, the student, have not yet used the IRS Data Retrieval Tool, but I will use the tool to transfer my (and, if married, my spouse's) 2013 IRS income information into my FAFSA once I have filed my 2013 IRS tax return. *See instructions above for information on how to use the IRS Data Retrieval Tool. Your school cannot complete the verification process until your (and, if married, your spouse's) IRS information has been transferred into your FAFSA.*
- ☐ I, the student, am unable or choose not to use the IRS Data Retrieval Tool in FAFSA on the Web, and I will submit to the school a **2013 IRS tax return transcript(s)**—not photocopies of the income tax return. *To obtain an IRS tax return transcript, go to www.irs.gov and click on the "Order a Return or Account Transcript" link, or call 1-800-908-9946. Make sure to request the "IRS tax return transcript" and not the "IRS tax account transcript." You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when your 2013 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you are married and you and your spouse filed separate 2013 tax returns, you must submit tax return transcripts for both you and your spouse.*
- ☐ *Check here if an IRS tax return transcript(s) is attached to this worksheet.*
- ☐ *Check here if IRS tax return transcript(s) will be submitted to your school later. Verification cannot be completed until the IRS tax return transcript(s) has been submitted to your school.*

2. TAX RETURN NONFILERS—Complete this section if you, the student (and, if married, your spouse), will not file and are not required to file a 2013 income tax return with the IRS.

Check the box that applies:

- ☐ The student (and, if married, the student's spouse) was not employed and had no income earned from work in 2013.
- ☐ The student (and/or the student's spouse if married) was employed in 2013 and has listed below the names of all employers, the amount earned from each employer in 2013, and whether an IRS W-2 form is attached. **Attach copies of all 2013 W-2 forms issued to you (and, if married, to your spouse) by employers.** *List every employer even if the employer did not issue an IRS W-2 form. If more space is needed, attach a separate page with your name and SSN at the top.*

Employer's Name	2013 Amount Earned	IRS W-2 Attached?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00</i>	<i>Yes</i>

Student's Name: _____ SSN: _____

D. Independent Student's Other Information to Be Verified

1. Complete this section if someone in the student's household (listed in Section B) received benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as food stamps) any time during the 2012 or 2013 calendar years.

☐ One of the persons listed in Section B of this worksheet received SNAP benefits in 2012 or 2013. If asked by my school, I will provide documentation of the receipt of SNAP benefits during 2012 and/or 2013.

2. Complete this section if you or your spouse, if married, paid child support in 2013.

☐ Either I, or if married my spouse who is listed in Section B of this worksheet, paid child support in 2013. I have indicated below the name of the person who paid the child support, the name of the person to whom the child support was paid, the names of the children for whom child support was paid, and the total annual amount of child support that was paid in 2013 for each child. If asked by my school, I will provide documentation of the payment of child support. *If you need more space, attach a separate page that includes your name and Social Security Number at the top.*

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name of Child for Whom Support Was Paid	Amount of Child Support Paid in 2013
<i>Marty Jones(example)</i>	<i>Chris Smith</i>	<i>Terry Jones</i>	<i>\$6,000.00</i>

E. Certification and Signature

I certify that all of the information reported on this worksheet is complete and correct. The student must sign this worksheet. If married, the spouse's signature is optional.

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Student's Signature

Date

Spouse's Signature

Date

***Do not mail this worksheet to the U.S. Department of Education.
Submit this worksheet to the Financial Aid Office at UNTHSC.***

You should make a copy of this worksheet for your records.

2014–2015 Verification Worksheet Dependent Student (HRSA Definition)

Your 2014–2015 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you and your parents reported on your FAFSA. To verify that you provided correct information the financial aid administrator at your school will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You and at least one parent must complete and sign this worksheet, attach any required documents, and submit the form and other required documents to the financial aid administrator at your school. Your school may ask for additional information. If you have questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed.

F. Dependent Student's Information

Student's Last Name	Student's First Name	Student's M.I.	Student's Social Security Number
Student's Street Address (include apt. no.)			Student's Date of Birth
City	State	Zip Code	Student's Email Address
Student's Home Phone Number (include area code)			Student's Alternate or Cell Phone Number

G. Dependent Student's Family Information

List below the people in your parent(s)' household. Include:

- Yourself and your parent(s) (including a stepparent) even if you don't live with your parent(s).
- Your parent(s)' other children if your parent(s) will provide more than half of their support from July 1, 2014, through June 30, 2015, or if the other children would be required to provide parental information if they were completing a FAFSA for 2014–2015. Include children who meet either of these standards, even if they do not live with your parent(s).
- Other people if they now live with your parent(s) and your parent(s) provide more than half of their support and will continue to provide more than half of their support through June 30, 2015.

Include the name of the college for any household member, excluding your parent(s), who will be enrolled, at least half time in a degree, diploma, or certificate program at a postsecondary educational institution any time between July 1, 2014, and June 30, 2015. *If more space is needed, attach a separate page with the student's name and Social Security Number at the top.*

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time
<i>Missy Jones (example)</i>	<i>18</i>	<i>Sister</i>	<i>Central University</i>	<i>Yes</i>
		<i>Self</i>		

Student's Name: _____ SSN: _____

H. Dependent Student's Income Information to Be Verified

3. TAX RETURN FILERS—**Important Note:** If the student filed, or will file, an amended 2013 IRS tax return, the student must contact the financial aid administrator before completing this section.

Instructions: Complete this section if the student, filed or will file a 2013 income tax return with the IRS. *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If the student has not already used the tool, go to FAFSA.gov, log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the student is eligible to use the IRS Data Retrieval Tool to transfer 2013 IRS income tax information into the student's FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about when, or how to use the IRS Data Retrieval Tool see your financial aid administrator.*

Check the box that applies:

- ☐ The student has used the IRS Data Retrieval Tool in FAFSA on the Web to retrieve and transfer 2013 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *The student's school will use the IRS information that was transferred in the verification process.*
- ☐ The student has not yet used the IRS Data Retrieval Tool in FAFSA on the Web, but will use the tool to retrieve and transfer 2013 IRS income information into the student's FAFSA once the student has filed a 2013 IRS tax return. *See instructions above for information on how to use the IRS Data Retrieval Tool. The student's school cannot complete the verification process until the IRS information has been transferred into the FAFSA.*
- ☐ The student is unable or chooses not to use the IRS Data Retrieval Tool in FAFSA on the Web, and the student will submit to the school a **2013 IRS tax return transcript**—not a photocopy of the income tax return. *To obtain an IRS tax return transcript, go to www.irs.gov and click on the "Order a Return or Account Transcript" link, or call 1-800-908-9946. Make sure to request the "IRS tax return transcript" and not the "IRS tax account transcript." You will need your Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2013 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers.*
- ☐ Check here if the student's IRS tax return transcript is attached to this worksheet.
- ☐ Check here if the student's IRS tax return transcript will be submitted to the student's school later. Verification cannot be completed until the IRS tax return transcript has been submitted to the student's school.

4. TAX RETURN NONFILERS—Complete this section if the student, will not file and is not required to file a 2013 income tax return with the IRS.

Check the box that applies:

- ☐ The student was not employed and had no income earned from work in 2013.
- ☐ The student was employed in 2013 and has listed below the names of all the student's employers, the amount earned from each employer in 2013, and whether an IRS W-2 form is attached. Attach copies of all 2013 IRS W-2 forms issued to the student by employers. *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name and Social Security Number at the top.*

Employer's Name	2013 Amount Earned	IRS W-2 Attached?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00(example)</i>	<i>Yes(example)</i>

Student's Name: _____ **SSN:** _____

I. Parent's Income Information to Be Verified—Note: If two parents were reported in Section B of this worksheet, the instructions and certifications below refer and apply to both parents.

1. TAX RETURN FILERS—Important Note: If the student's parent(s), filed or will file, an amended 2013 IRS tax return the student's financial aid administrator must be contacted before completing this section.

Instructions: Complete this section if the student's parent(s) filed or will file a 2013 income tax return with the IRS. *The best way to verify income is by using the IRS Data Retrieval Tool that is part of FAFSA on the Web. If the student's parent(s) has not already used the tool, the parent and the student should go to FAFSA.gov, log in to the student's FAFSA record, select "Make FAFSA Corrections," and navigate to the Financial Information section of the form. From there, follow the instructions to determine if the parent(s) is eligible to use the IRS Data Retrieval Tool to transfer 2013 IRS income tax information into the student's FAFSA. It takes up to two weeks for IRS income information to be available for the IRS Data Retrieval Tool for electronic IRS tax return filers, and up to eight weeks for paper IRS tax return filers. If you need more information about whether or how to use the IRS Data Retrieval Tool see the student's financial aid administrator.*

Check the box that applies:

- ☐ The student's parent has used the IRS Data Retrieval Tool in FAFSA on the Web to transfer 2013 IRS income information into the student's FAFSA, either on the initial FAFSA or when making a correction to the FAFSA. *The student's school will use the IRS information transferred into the student's FAFSA to complete the verification process.*
- ☐ The student's parent has not yet used the IRS Data Retrieval Tool, but will use the tool to transfer 2013 IRS income information into the student's FAFSA once the parent's IRS tax return has been filed. *See instructions above for information on how to use the IRS Data Retrieval Tool. The student's financial aid administrator cannot complete verification until the parent has transferred IRS information into the student's FAFSA.*
- ☐ The parent is unable or chooses not to use the IRS Data Retrieval Tool, and the parent will submit to the student's school a copy of the parent's **2013 IRS tax return transcript(s)**—not photocopies of the income tax return. *To obtain an IRS tax return transcript go to www.irs.gov and click on the "Order a Return or Account Transcript" link, or call 1-800-908-9946. Make sure you order the "IRS tax return transcript" and not the "IRS tax account transcript." The parent will need his or her Social Security Number, date of birth, and the address on file with the IRS (normally this will be the address used when the 2013 IRS tax return was filed). It takes up to two weeks for IRS income information to be available for electronic IRS tax return filers, and up to eight weeks for paper tax return filers. If the parents are married, and separate 2013 tax returns were filed, 2013 IRS tax return transcripts must be submitted for each parent.*
- ☐ Check here if an IRS tax return transcript(s) is attached to this worksheet.
- ☐ Check here if IRS tax return transcript(s) will be submitted to the student's school later. Verification cannot be completed until the IRS tax return transcript(s) has been submitted to the school.

2. TAX RETURN NONFILERS—Complete this section if the student's parent(s) will not file and is not required to file a 2013 income tax return with the IRS.

Check the box that applies:

- ☐ The parent(s) was not employed and had no income earned from work in 2013.
- ☐ The parent(s) was employed in 2013 and has listed below the names of all the parent's employers, the amount earned from each employer in 2013, and whether an IRS W-2 form is attached. Attach copies of all 2013 IRS W-2 forms issued to the parent(s) by employer(s). *List every employer even if they did not issue an IRS W-2 form. If more space is needed, attach a separate page with the student's name and Social Security Number at the top.*

Employer's Name	2013 Amount Earned	IRS W-2 Attached?
<i>Suzy's Auto Body Shop (example)</i>	<i>\$2,000.00 (example)</i>	<i>Yes (example)</i>

Student's Name: _____ SSN: _____

J. Parent's Other Information to Be Verified

3. Complete this section if someone in the student's parent's household (listed in Section B) received benefits from the Supplemental Nutrition Assistance Program or SNAP (formerly known as food stamps) any time during the 2012 or 2013 calendar years.

☐ One of the persons listed in Section B of this worksheet received SNAP benefits in 2012 or 2013. If asked by the student's school, I will provide documentation of the receipt of SNAP benefits during 2012 and/or 2013.

4. Complete this section if one of the student's parents paid child support in 2013.

☐ One (or both) of the student's parents listed in Section B of this worksheet paid child support in 2013. The parent has indicated below the name of the person who paid the child support, the name of the person to whom the child support was paid, the names of the children for whom child support was paid, and the total annual amount of child support that was paid in 2013 for each child. If asked by the school, I will provide documentation of the payment of child support. *If you need more space, attach a separate page that includes the student's name and Social Security Number at the top.*

Name of Person Who Paid Child Support	Name of Person to Whom Child Support was Paid	Name of Child for Whom Support Was Paid	Amount of Child Support Paid in 2013
<i>Marty Jones</i>	<i>Chris Smith (example)</i>	<i>Terry Jones</i>	<i>\$6,000.00</i>

K. Certification and Signatures

Each person signing this worksheet certifies that all of the information reported on it is complete and correct. The student and one parent must sign and date.

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

Student's Signature

Date

Parent's Signature

Date

***Do not mail this worksheet to the U.S. Department of Education.
Submit this worksheet to the financial aid administrator at your school.***

You should make a copy of this worksheet for your records.