Texas Application for State Financial Aid Advisory Committee (TASFAAC)
Meeting Notes
September 9, 2020
Approved September 30, 2020 TASFAAC Meeting

The Texas Higher Education Coordinating Board (THECB) Texas Application for State Financial Aid Advisory Committee (TASFAAC) convened at 10:06 a.m. on September 9, 2020, with the following committee members present: Courtney Balderas, Abraham Diaz, Lauren Discher, Demetra Durham, Phillip Fabian, Maria (Paloma) Garner, Victoria Graham, Don Hilton, Gordon Lipscomb, Ines Lopez, Ariela Martinez, Angelica Melendez, Tammy Mitchum, Judith Moncivais, Kristal Nicholson, Federico (Fred) Peña, Erin Porter, Erica Ramos, Ed Turney, Ociel Vazquez, and Shannon Venezia

Members Absent: Lisa Ann Schoenbrun

ApplyTexas Technical Team Members: Graham Chapman and David Muck

Community Stakeholder(s): Alexis Bauserman, Texas Education Agency, Catalina Mistler, Deputy Director in the Program Administration & Services Division, California Student Aid Commission, Larry Sharp, Associate Director Information Services, New Jersey Higher Education Student Assistance Authority and Becky Thompson, Director of Student Financial Assistance, Washington Student Achievement Council

THECB Staff: Claudette Jenks, Lisa Paiz, and Diana Foose

Agenda Item 1. Welcome and Introductions	Maria Paloma Garner, College Access Coordinator, Northside HS, Houston ISD, Committee Chair
Handout Provided: No	**Formal Decision/Action Required:** N/A
Critical Discussion Points: • Paloma Garner called meeting to order and welcomed committee members and guests. Committee members and invited attendees provided introductions.	

Agenda Item 2. Review and Adoption of Minutes for the July 31, 2020 Meeting	Maria Paloma Garner, College Access Coordinator, Northside HS, Houston ISD, Committee Chair
Handout Provided: Yes	**Formal Decision/Action Required:** On the motion by Fred Peña, seconded by Erica Ramos, committee approved this item.
Critical Discussion Points: • Committee reviewed the minutes from July 31, 2020.	

Agenda Item 3. Updates from Higher Education Subcommittee	Courtney Balderas, Assistant Director, The University of Texas at San Antonio Dreamers Resource Center
Handout Provided: No	**Formal Decision/Action Required:** N/A

Critical Discussion Points:
- Six committee members will meet on September 10, 2020 and provide update at next meeting.

Agenda Item 4. Updates from Student Focused Subcommittee	Erica Ramos, Financial Aid Officer and College Prep Counselor, PSJA Memorial ECHS
Handout Provided: No	**Formal Decision/Action Required:** N/A

Critical Discussion Points:

Subcommittee met on August 21, 2020 and developed the following recommendations for consideration.
- Institutions should have option to receive both eTASFA and hard copy PDF TASFA.
- Have pop-up explanations next to each question similar to FAFSA and current paper TASFA
- Mirror the current TASFA paper application but refrain from using predictive (smart logic) to prevent confusion when students change their answers
- Include two signature boxes, that can be signed by both student and parent via their cursor
  - Or boxes to "type in full name"
  - Or they get an email or text where they can "confirm signature" by check marking a box or receiving security code to type application similar to FAFSA verification
- Create a general email address; to receive emails from participants and/or stakeholders to share their opinions/ recommendations to advisory committee
- Upload portal to receive documents
- Allowing students to "turn in docs" in one place
- Submit Selective service card anytime during process
- Review Verbiage about privacy – put that "verbiage" at the top of the document, with a check box that confirms knowledge of privacy regulations
- More to come

Agenda Item 5. Panel discussion from other states who have a statewide on-line financial aid application	Shannon Venezia, Executive Director Student Financial Aid and Scholarships, Texas Tech University
Handout Provided: No	**Formal Decision/Action Required:** N/A

Critical Discussion Points:
Shannon Venezia facilitated a panel discussion of states that have a statewide online financial aid application. Committee heard from representatives from California, New Jersey, and Washington State. Representatives provided demonstrations of their state's application.

California – Catalina Mistler – Dream Act Application
- Application created in 2012.
- Application is similar to FAFSA with additional questions about Dream Act Eligibility.
- Application did create an EFC
- Institutions can draw down ISIR
- Had an ongoing committee with stakeholders
- Public Application until the application is completed, and then it creates an account, that requires a log in.
- System creates a pseudo-SS number for students; duplicates b/c students would not complete it and then start a new one
- Still received paper applications, had to be manually keyed
- Set up automatic registration with the online application; sent a data file to the SSS, but removed it due to privacy concerns

Questions ask about SS card or DACA, ARC etc., to see if student needs a TASFA or FAFSA
Question – Is pseudo/SS# is that "matched" by school and how does that load to school?
Schools don't use pseudo-SS#, they use a data file that is mostly demographic
Question – Are schools required to use this application? Available to all schools, but not required

New Jersey – Larry Sharp
- Open since 2018, mimics FAFSA, but took out questions we didn't need
- Didn't make it "look" like FAFSA, because it intimidates students
- No social security number, it defaults to all 999
- Make the ISIR transaction of 55, to identify a "dreamer student" from any other FAFSA
- Create an ISIR file
- Can create a "correction" in the system
- Electronic Upload
- Has smart logic: Tells non-NJ residents that they are ineligible for state aid
- Corrections have to go through the institution

Question – Have all institutions agreed on what items are required for "verification"?
It is the same documents across the board, since it is through the "NJ Grant site"
Question – Who funded the E-application? The institution funded it.
Question: How do parents sign the application? Uses the "name" entry as a signature
Run external process, if a student completes a FAFSA and a TASFA, turns off the "FAFSA"?
Question: Can this be completed on mobile? Yes, it is mobile compatible

Washington State– Becky Thompson
- Legislation started 2014
- Used a vendor due to time frame, had 5 months to complete, have a mixed setup between vendor and homegrown
- Needed an EFC calculation, worried about yearly maintenance to calculate the EFC
- There are a few questions off of FAFSA
- Added Custom questions about residency
- Parent must log in and establish a user ID, verify e-signature from Parent
- Have translation available
- Used community non-profits, as partners, to do outreach to this population
- Privacy statement is very important (duplicated, in multiple places)
- Cannot select every student for verification, not fair

- Allowed to use a portion of grant funding to pay vendor, to maintain application in the amount of 100K. Not in legislation, just in the budget and has been carried forward each year

Agenda Item 6. Discussion on identifying technical and functional revisions of the ApplyTX system	Graham Chapman, The University of Texas at Austin
Handout Provided: No	**Formal Decision/Action Required:** N/A

- No update at this time.

Agenda Item 7. Update on House Bill 3 - FAFSA Advisory Committee	Alexis Bauserman, Texas Education Agency
Handout Provided: No	**Formal Decision/Action Required:** N/A

Critical Discussion Points:
Alexis Bauserman provided an update from the FAFSA Advisory Committee regarding the completion of FAFSA to qualify for HS Graduation
- Reviewing opt out of requirement – school counselor, of age student or parent
- Committee provides guidance for what that might look like, a policy recommendation to define it
- Thinking about stakeholder needs, tools to provide, topics to cover per each etc.
- Reporting requirements – how to make it work and report it
- Commissioners Rules need to be vetted, TAC – resources to students etc. & privacy

Question – Having a standard Opt out form for HS? Would it be only for FAFSA or include TASFA? Should encompass both FAFSA/TASFA applications

Agenda Item 8. Discussion on proposed draft recommendations	Claudette Jenks, THECB
Handout Provided: No	**Formal Decision/Action Required:** N/A

Critical Discussion Points:
Three main Recommendations:
(1) Establish the paper TASFA to use as the standard.
(2) Require institutions of higher education to use the online or Coordinating Board developed TASFA to verify specific student eligibility for state financial aid.
(3) Provide funding for the development and maintenance of the online TASFA.

Paloma Gardner recommended that subcommittee recommendations be added to the recommendations also. Committee will discuss recommendations at next meeting.

Agenda Item 9. Discussion of Potential Agenda Items and Next Meeting Date	Maria Paloma Garner, College Access Coordinator, Northside HS, Houston ISD

Handout Provided: No	Formal Decision/Action Required: N/A
- Subcommittee updates - Discussion of recommendations - Doodle Poll will be sent out to determine a date.	
Agenda Item 10. Adjournment	Maria Paloma Garner, College Access Coordinator, Northside HS, Houston ISD
Handout Provided: No	**Formal Decision/Action Required:** On the motion by Erica Denae Ramos, seconded by Judith Moncivais, committee approved this item.
Meeting adjourned at 12:03 p.m.	