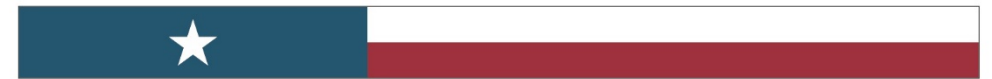


State Financial Aid Webcast

Leah Smalley
Student Financial Aid Programs
May 14, 2019

60x30TX



Texas Higher Education
Coordinating Board

Today's Agenda

- ✓ Legislative Update
- ✓ 2019-20 Program Guideline Changes
- ✓ Authority to Transfer
- ✓ Year-Round Grant Update
- ✓ Award History for Grant Programs
- ✓ User Access Process
- ✓ Upcoming Events & Deadlines



Legislative Update



Legislative Update: SFAP Bill Tracking



All bills are active until the session ends.

Nothing becomes a law until the Governor signs the General Appropriations Act.



86th Legislative Session will conclude at the end of May.

June 16, 2019 is the last day the governor can sign or veto bills passed during the regular session.

My TLO: <https://capitol.texas.gov/MnuMyTLO.aspx>

Program Guidelines Update



Program Guidelines Update

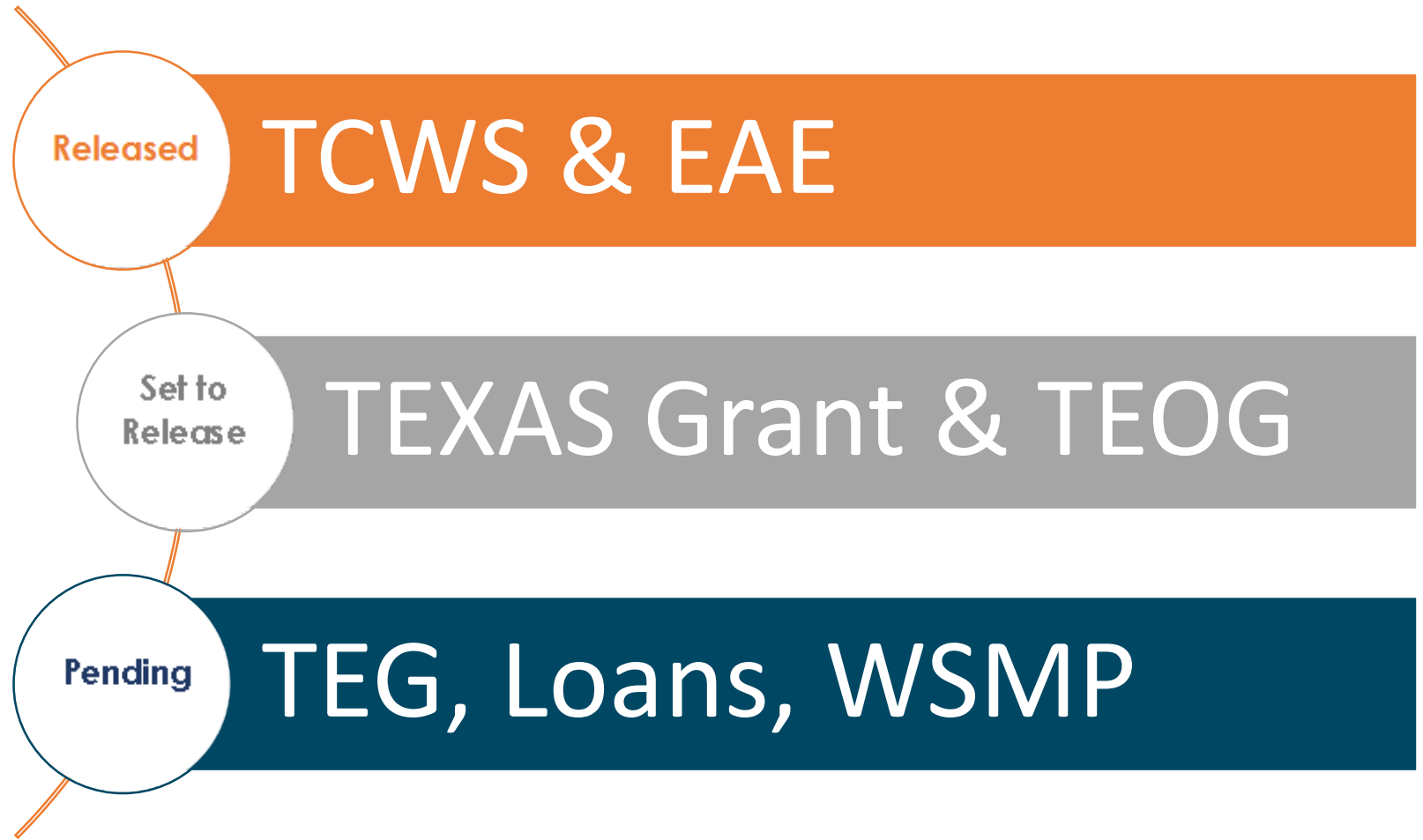
2019-20
Program Guidelines
Texas College
Work-Study (TCWS)

6
Tex

2019-20
Program Guidelines
Educational Aide
Exemption (EAE)

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Student Financial Aid Programs
Texas Higher Education Coordinating Board



Selective Service Clarification

When is a statement NOT required?

A **Selective Service Status Statement** is not required when a student's registration is confirmed on the Institutional Student Information Record (ISIR). The confirmation on the ISIR will serve as the student's signed statement since the Department of Education validates registration directly with the Selective Service System (SSS) through a database match for male students who complete the Free Application for Federal Student Aid (FAFSA).

When is a statement required?

- For a male student that completes a FAFSA but is flagged "not registered" on the ISIR, the institution must determine the student's status.
 - If the student is **registered**, the institution must collect the status statement and proof of registration which can be used for subsequent semesters.
 - If the student is **exempt**, the institution must collect the status statement and proof of exemption based on the student's circumstances. The institution can determine what additional documentation to collect to verify the exemption.
- For a male student that does not complete a FAFSA, the required status statement and back-up documentation must be collected by the institution to verify the current selective service status if the individual is applying for any state financial aid.

ADDITIONAL INFORMATION

REPROCESSED ISIRS

If the student's most recent ISIR transaction has been reprocessed by the Central Processing System (CPS) and the registration with SSS was confirmed, the institution does not need to collect the status statement or any documentation.

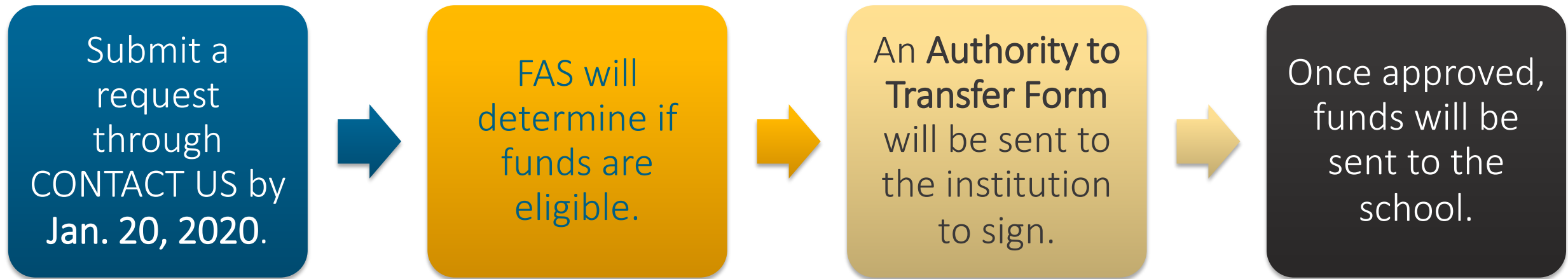
Authority to Transfer

AUTHORITY TO TRANSFER FUNDS (19 TAC, SECTION 22.135)

Institutions participating in a combination of TCWS, TEXAS Grant, TEOG, and TEG may transfer up to 10% of the institution's total annual program allocation or \$20,000 (whichever is less) between programs within the relevant fiscal year. Institutions requesting a transfer between programs must submit an online inquiry by the deadline listed below through [CONTACT US](#) (select the "Financial Aid Question" option in the drop-down selection under Contact Reason). The Financial Aid Services staff will respond to the institution to provide next steps for the process.

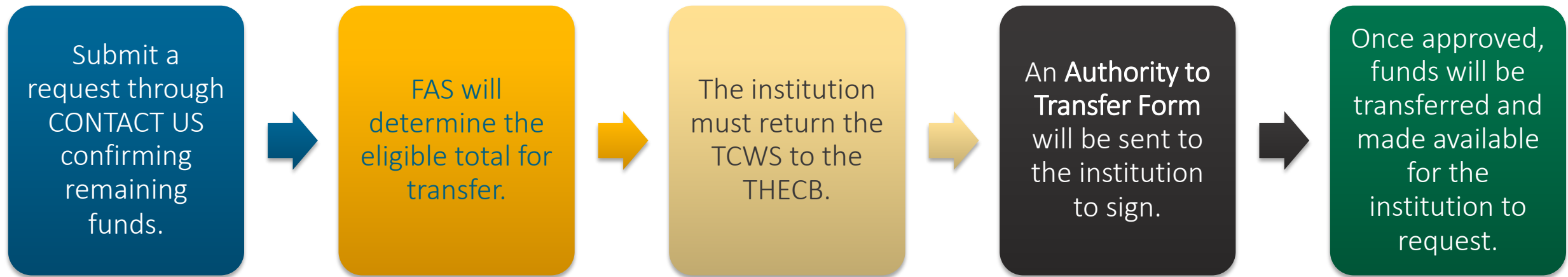
TRANSFER FROM:	TRANSFER TO:	AUTHORITY TO TRANSFER REQUEST DEADLINE DATE
TEXAS Grant TEOG TEG	TCWS	JANUARY 18
OR		
TCWS	TEXAS Grant TEOG TEG	JUNE 14
Funds can only be transferred from a grant to TCWS or vice versa, never from a grant to a grant.		

Authority to Transfer: GRANT → TCWS



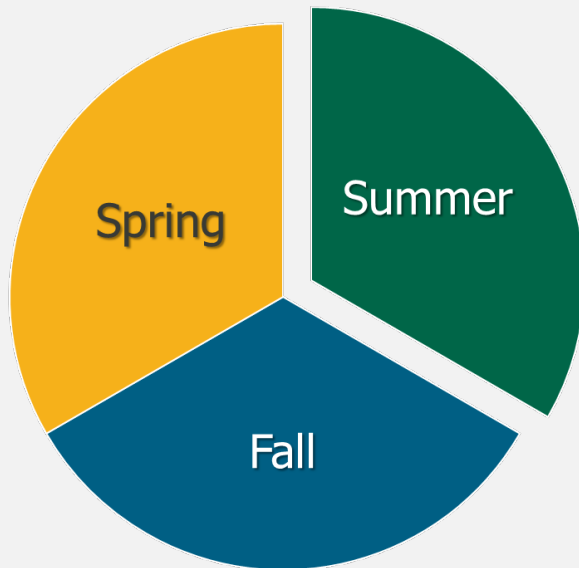
NOTE: Transferred funds must be expended during the spring semester.

Authority to Transfer: TCWS → GRANT



NOTE: Transferred funds must be requested by August 1.

Year-Round Grants



- Beginning in the 2018-19 award year, the reallocation process was eliminated for the three state grant programs.
- Institutions have until the close of business on **August 1** to request grant funding.
- Extending the award year allows institutions that have remaining funds from the approved allocation to award students attending the summer terms.
 - Header institutions = Summer 2018
 - Trailer institutions = Summer 2019

Summer Awards

Since summer terms vary in length, summer terms can be combined to meet the minimum enrollment requirement.

NOTE: If a student fails to enroll or drops hours, the institution should adhere to the timely disbursement rules.

- Texas Grant Example:

Summer I: 6 SCH

Summer II: 3 SCH

- TEOG Example:

Summer I: 2 SCH

Summer II: 4 SCH

- TEG Example:

Summer I: 3 SCH

Summer II: 6 SCH

2018-19 Award Amounts

If an institution chooses to issue 2018-19 summer awards, the extended award period WILL IMPACT awarding philosophies.

Students may be issued a total of 3 awards (Fall, Spring, and Summer) in an academic year.

In accordance with the TEC and TAC, the THECB determines the **semester** award maximum for TEXAS Grant and TEOG, and the **annual** award maximum for TEG.

The total funds awarded for TEXAS Grant or TEOG cannot exceed the semester award maximum **multiplied by 3**.

Below are the 2018-19 TEXAS Grant and TEOG award amounts allowed for by institution type:

Program	Public Institution Type	2018-19 Semester Award Maximums
Fall: \$2,500 TEXAS Grant	Spring: Universities & Health Related-Institutes	Summer: \$2,500 \$4,674 = \$ 7,500 TARGET: \$2,500
Fall: \$1,575 TEOG	• TEOG Community College Example: State Colleges	\$2,931
	Technical Institutes	\$2,795
	Community Colleges	\$1,575
		Summer: \$1,575 \$2,795 = \$ 4,725

2018-19 Award Amounts

If an institution chooses to issue 2018-19 summer awards, the extended award period WILL IMPACT awarding philosophies.

Students may be issued a total of 3 awards (Fall, Spring, and Summer) in an academic year.

In accordance with the TEC and TAC, the THECB determines the **semester** award maximum for TEXAS Grant and TEOG, and the **annual** award maximum for TEG.

The total combined TEG award cannot exceed the **annual** award maximum.

Below are the TEG 2018-19 award amounts maximums:

Program	Private Institution Type	2018-19 Annual Award Maximums
TEG	Universities & Colleges	$\$3,364 + \$420 = \$3,420$ Exceptional Need: \$5,046

Calculating SAP 2018-19

Calculating Satisfactory Academic Progress (SAP)

For 2018-19, institutions **must** include credits attempted for summer coursework when calculating the satisfactory academic progress (SAP) if the student **receives** grant funding.

If a student does **not receive** state grant funding for the summer term(s), a student can take summer coursework to re-establish eligibility if he/she had failed to meet SAP requirements during his/her last term or semester. Summer coursework (not funded using state grants) should not be used to recalculate SAP if the attempted credits will result in the student losing his/her eligibility for the fall term.

AWARD HISTORY

Award History – Individual Look-Up

Option A Log into CBPass

CBPass Login

Sign in with your CBPass Account

*Username:

*Password:

[Sign In](#)

[Forgot your Username or Password?](#)

don't have an account? [create one now!](#)

TEXAS Grant

- To view all the students at your institution, click on "View All"
- OR
- To view all the students at your institution who have received a grant, click on "View"
- OR
- To search for a particular student by SSN, enter their SSN and click on "Search by SSN"
- OR
- To search for a particular student by Name and Birthdate, enter their First Name, Last Name, and Birthdate (*all three fields are required) and click on "Search by Name and Birthdate".

Sort list by: [View All](#)

Students who have received the TX Grant award for 125 hours or greater [View](#)

SSN 1:

SSN 2:

SSN 3:

SSN 4:

SSN 5:

SSN 6:

Search by SSN

First Name:

Last Name:

Birthdate (mm/dd/yyyy):

Search by Name and Birthdate

Option B Submit a file using MOVEit

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Home Folders Logs Search

Find File/Folder

Go To Folder...

Online Manual Tech Support

Powered by MOVEit

Folders

Go To Folder...

Name	Created	Size/Contents
Parent Folder		
FADS_Output	4/22/2016 7:37:13 AM	99
Loans_Output	4/5/2016 8:17:27 AM	2888
Grant_Output	4/5/2016 8:15:31 AM	4 0

Selected File/Folder Actions:

Delete

Destination folder...

Copy Move Advanced Copy/Move Options >>

Upload a File

Select a folder:

Choose a file: Browse...

Enter any notes:

Upload

The **Results** will display all relevant and available program eligibility information.

TEXAS Grant	StudentID	DOB	First Name	Last Name	Hrs YTD	IY	IYS	L_Year	L_FICE	L_MetSAP	L_HrAttempted
	999999996,	4/25/1999,	Raul	,Phong	,38	,2018	,1	,2018	,001127	,Y	,24
	999999997,	4/26/1999,	Mark	,Martin	,66	,2018	,2	,2018	,001128	,Y	,18

TEOG	StudentID	DOB	First Name	Last Name	Hrs YTD	IY	IYS	L_Year	L_FICE	L_MetSAP	L_HrAttempted
	999999993,	4/22/1999,	Sahira	,Smith	,75	,2016	,1	,2017	,001124	,Y	,24
	999999994,	4/23/1999,	Jeniffer	,Johnson	,30	,2016	,1	,2016	,001125	,N	,18

TEG	StudentID	DOB	First Name	Last Name	IY	IYS	L_Year	L_FICE	L_MetSAP	L_HrAttempted	L_Degree
	999999991,	4/20/1999,	Fransico	,Lopez	,2016	,1	,2018	,001122	,Y	,15	4
	999999992,	4/21/1999,	Lisa	,Rodriguez	,2016	,2	,2016	,001123	,Y	,12	B

User Access Process

User Access Process

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Plan, Pay, & Complete College ▾ Institutional Resources & Programs ▾ Data & Reports ▾ Legislative & Media Resources ▾ About Us ▾

- Institutional Resources & Programs
 - Public Community, Technical, & State Colleges
 - Public Universities & Health-Related Institutions
 - Private Postsecondary Institutions
 - Institutional Grant Opportunities
 - Funding & Facilities
 - Governing Board Member Training
 - Star Award Program
 - Student Financial Aid Programs
 - Stay Connected
 - Program Resources
 - SFAP Frequently Asked Questions
 - Learning Resources
 - Online Resources

Online Resources

REPORTS

[FY 2018 State-Funded Campus-Based Programs Report](#)

- [State-Funded Campus-Based Programs Report Examples](#)

[License Plate Insignia Program End-Of-Year Report](#)

[FY 2019 FAD Comprehensive Manual Reporting \[PDF\]](#)

[FY 2018 FAD Comprehensive Manual Reporting Cycle 3 \[PDF\]](#)

FORMS

[FAD Reconciliation Form \[PDF\]](#)

[Electronic Funds Transfer \(EFT\) – Wire Information](#)

[Authority to Transfer Form \[PDF\]](#)

[Grants and Special Programs Online Return of Funds Form](#)

- [Return of Funds Form Instructions \[PDF\]](#)

[Loan Programs Online Return of Funds Form](#)

- [Return of Funds Form Instructions \[PDF\]](#)

[System Authorization Form \[PDF\]](#)

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System Authorization Form

This form should be completed by the Director of Financial Aid to add, update or remove user access to secure web portals managed by the Texas Higher Education Coordinating Board (THECB). These web portals allow staff at the institution to access to FERPA regulated information. For compliance and security purposes, institutions are required to ensure user access to these portals are accurate. User information should be reviewed and updated throughout the year.

SECURE WEB PORTALS

Higher Education Loan Management System (HELMNET) requires an individualized ID and password to access to electronic files created and maintained by THECB for those students who have applied for and received state-funded student loans. Users with access can update and certify state loan applications.

Coordinating Board Identification (CBPASS) requires an individualized ID and password to access the online funds request form and to search student award history for Toward Excellence, Access, and Success (TEXAS) Grant, Texas Educational Opportunity Grant (TEOG), and Tuition Equalization Grant (TEG). For adding and updating user access refer to the [CBPASS instructions](#).

MOVEIT DMZ has one assigned user ID and password at each institution. MOVEIT DMZ safely and securely collects, stores, manages, and distributes sensitive information between an institution and THECB. The Director of Financial Aid is the THECB point of contact for this portal. The Director can assign up to two designees at the institution that can request and reset login information.

INSTITUTION CONTACT INFORMATION

Institution Name	FICE Code
Director of Financial Aid Name	Phone
Email	

INSTITUTION AUTHORIZATION

I certify that _____ shall implement procedures to assure that only authorized users under this agreement have access to HELMNET, CBPASS, and MOVEIT DMZ web portals. I further understand that if a user no longer requires access, I will take the necessary measures to remove their access.

Director of Financial Aid Signature: _____ Date: _____

NOTE:

Compatibility issues with certain browsers may not allow the electronic version of this form to be submitted (including E-Signature). Forms that cannot be sent using the **SUBMIT** button on this form (see page 3) should be manually completed, scanned and emailed to useraccess@theeb.state.tx.us.

REMOVE ACCESS FOR HelmNet OR CBPass: FOR USERS THAT NO LONGER REQUIRE ACCESS, A REASON MUST BE PROVIDED.

PROGRAM	TITLE	FIRST NAME	LAST NAME	REASON
Choose ▾				
Choose ▾				
Choose ▾				
Choose ▾				
Choose ▾				
Choose ▾				
Choose ▾				

MOVEIT DMZ: FOR THE DIRECTOR OF FINANCIAL AID TO ADD, REMOVE, OR UPDATE DESIGNEE INFORMATION. THE DIRECTOR CAN ASSIGN ONLY TWO DESIGNEES AT THE INSTITUTION THAT CAN REQUEST AND RESET LOGIN INFORMATION.

	TITLE	FIRST NAME	LAST NAME	PHONE	EMAIL
Add					
Add					
Remove					
Remove					
Current					
Updated					

To send the completed form:

Click the **SUBMIT** button.
An automatic email notification will open in a new window with an attached completed form.
Add your six-digit FICE code in the subject line Example: 012345_File Name.
Be sure to click the **SEND** button to submit the report.

For questions, please contact Financial Aid Services at (844) 792-2640.

SUBMIT

If you are unable to **SUBMIT** this form, save the signed PDF file (.pdf) and email as an attachment to : useraccess@theeb.state.tx.us.

ANY
QUESTIONS
?

Upcoming Events & Important Dates

Updates

- Good Neighbor Selected Recipients
- Allocations Coming Soon
- Net Price Calculator (NPC) Update

Training

- New Aid Officer Workshop (NAOW) – May 22, 2019
- FAS Webcast – June 11, 2019

Important Dates

- FAAC Quarterly Meeting – June 6, 2019
- 2018-19 FAD Cycle Two Opens – June 10, 2019
- 86th Legislative Session Ends – May 27, 2019

Financial Aid Services

Institutional Toll-Free Number

**For questions call:
(844) 792-2640**



Institutional toll-free number is available M-F 8:00 a.m. – 5:00 p.m.

Contact Information and Feedback

Email: leah.smalley@thecb.state.tx.us

Webcast Survey: <https://www.surveymonkey.com/r/58YRM92>

**Financial Aid Services Phone Line
(Schools):** 844-792-2640

**Texas Financial Aid Information Center Line
(Students):** 888-311-8881