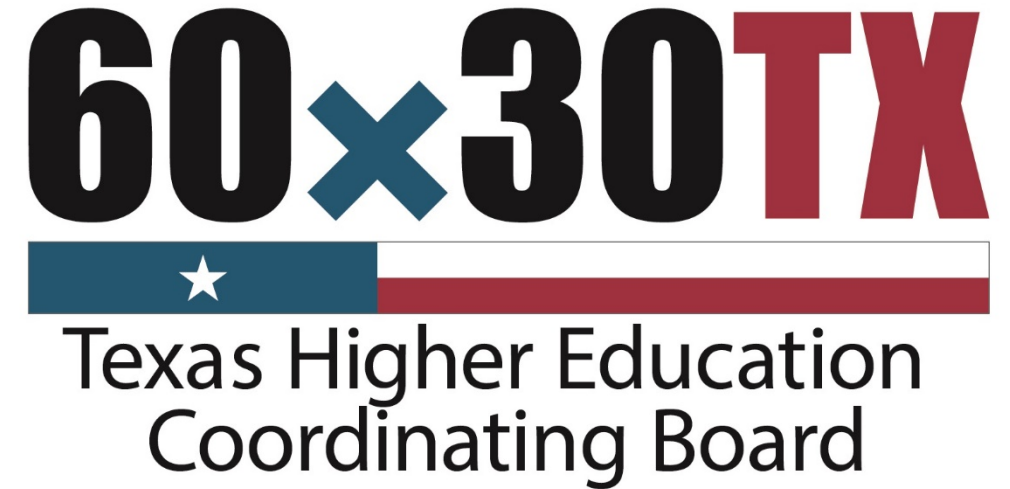


State Financial Aid Webcast

Leah Smalley
Student Financial Aid Programs
March 10, 2020





Expansion of Financial Aid Services

2020-21 Program Guidelines

HelmNet Updates

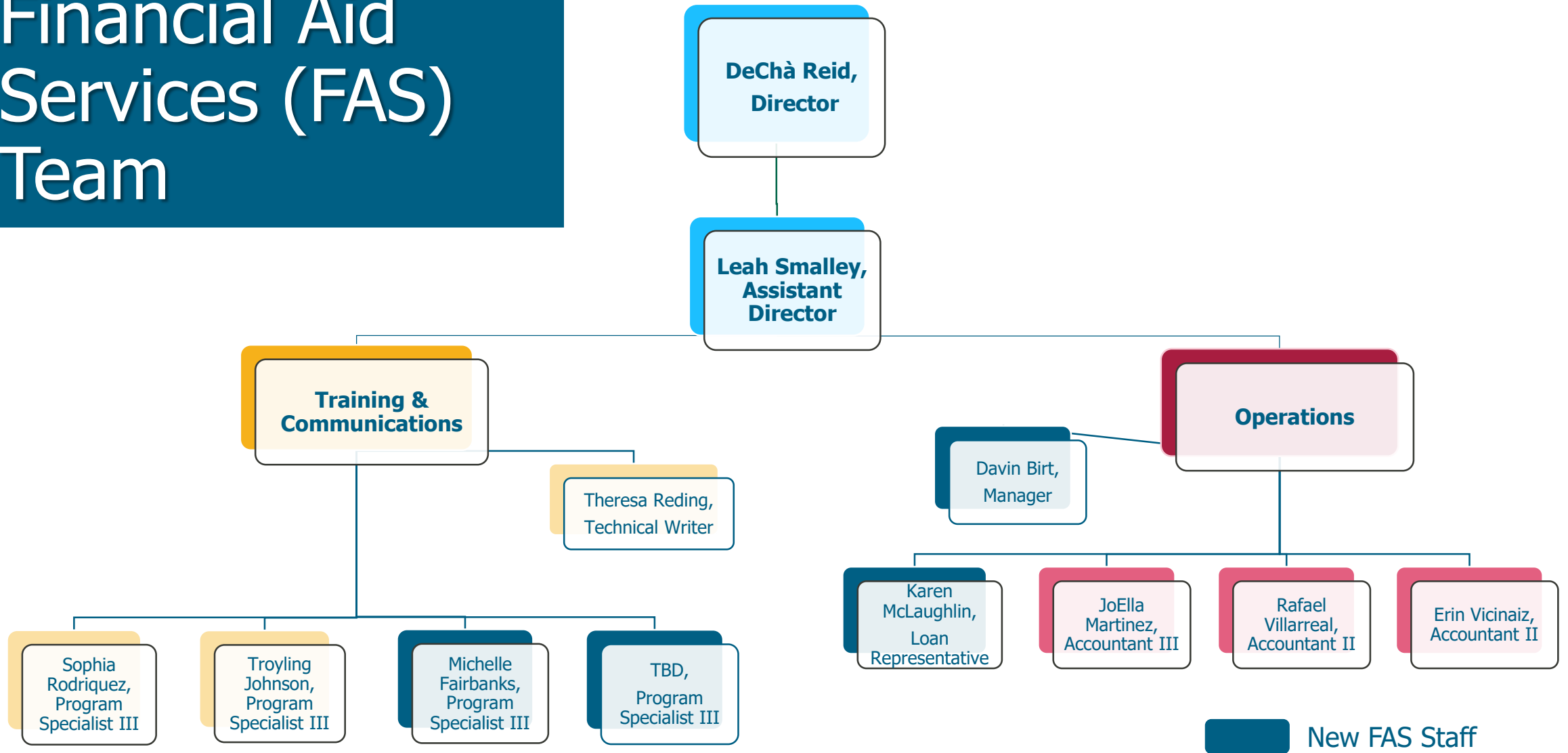
SFAP Website Improvements

TASFA Feedback

Financial Aid Database (FAD) Updates

Financial Aid Services Staff Expansion

Financial Aid Services (FAS) Team



Program Guidelines

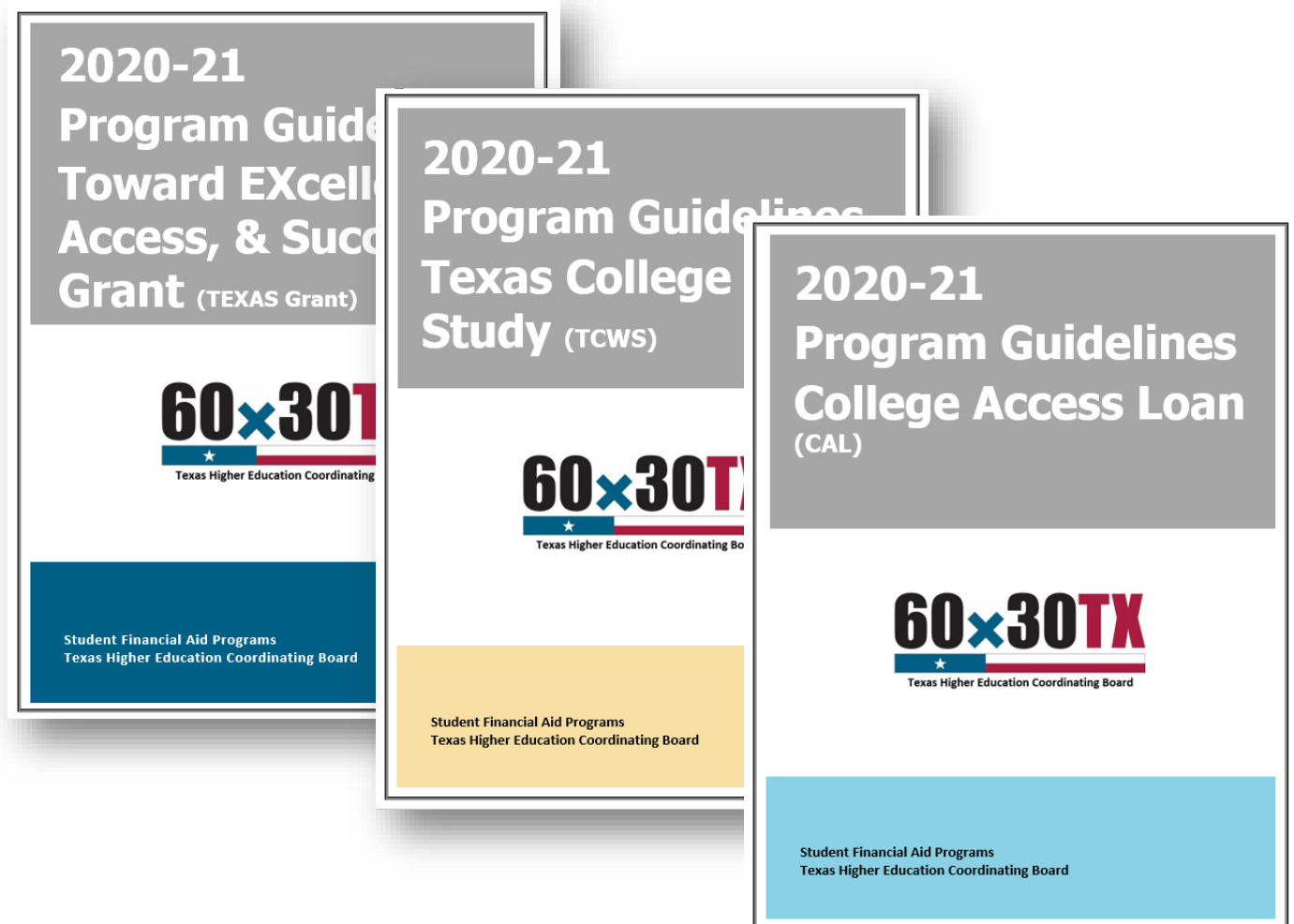
2020-21 Program Guidelines

Coming Soon...


TEXAS Grant	TCWS
TEOG	WSMP
TEG	CAL
EAE	TASSP

Available:

- Children of Disabled or Deceased Firefighters and Law Enforcement Officers
- Education Benefits for Certain Survivors
- Firefighters Enrolled in Fire Science Courses
- Good Neighbor Program
- Peace Officers and Firefighters Disabled in the Line of Duty
- Peace Officers Enrolled in Certain Courses



General Provisions – Chapter 22



OFFICE of the SECRETARY of STATE

Texas Administrative Code

[TITLE 19](#) EDUCATION
[PART 1](#) TEXAS HIGHER EDUCATION COORDINATING BOARD
[CHAPTER 22](#) STUDENT FINANCIAL AID PROGRAMS
[SUBCHAPTER A](#) GENERAL PROVISIONS

Rules

[§22.1](#) Definitions
[§22.2](#) Timely Distribution of Funds
[§22.3](#) Student Compliance with Selective Service Registration
[§22.4](#) Records Retention
[§22.5](#) Exclusion of Certain Resources in Determining Need for State Aid
[§22.6](#) Priority Deadline for Applying for State Aid
[§22.7](#) Dissemination of Information and Rules
[§22.9](#) Institutional Responsibilities
[§22.10](#) ~~Grade Point Average Calculations for Satisfactory Academic Progress~~
[§22.11](#) Provisions specific to the TEXAS Grant, TEOG, TEG, and Texas Work-Study Programs

[HOME](#) [TEXAS REGISTER](#) [TEXAS ADMINISTRATIVE CODE](#) [OPEN MEETINGS](#)

Source:

[https://texreg.sos.state.tx.us/public/readtac\\$ext.ViewTAC?tac_view=5&ti=19&pt=1&ch=22&sch=A&rl=Y](https://texreg.sos.state.tx.us/public/readtac$ext.ViewTAC?tac_view=5&ti=19&pt=1&ch=22&sch=A&rl=Y)

HelmNet Updates

Online Loan Reporting...coming soon

The screenshot displays the 60x30TX Texas Higher Education Coordinating Board website. The header features the 60x30TX logo and the text "Texas Higher Education Coordinating Board". A navigation menu on the left includes links for "Change Password", "Logout", "New School Certification Inquiry", "Application Query", "Borrower Query", "Loan Query", "Disbursal Query", "Allocation Lookup" (highlighted with a red box), "Login Tips", and "ACH Enrollment Tips". The main content area has tabs for "Application Query", "Disbursal Query", and "Allocation Lookup". The "Allocation Lookup" tab is active, showing a "Daily Allocation Reports" section. A red box highlights a message: "BOT Counseling Report (opens in Excel as .csv file)" and "School Allocation Reporting". Below this, a message states: "The School Allocation Report is unavailable due to system maintenance. We apologize for the inconvenience as we work to perform some necessary upgrades. For questions or concerns, please contact Financial Aid Services at 1-844-792-2640." The footer includes the "Texas Higher Education Coordinating Board" name, a "Contact Us" link, and a list of links: "THECB Home", "HHLoans Home", "Privacy and Security Policy", and "Compact with Texans". It also displays the text "THECB - UAT A - HELMNet Build: 11/22/2019 8:33 AM".

60x30TX
Texas Higher Education
Coordinating Board

Change Password Logout

New School Certification Inquiry

Application Query

Borrower Query

Loan Query

Disbursal Query

Allocation Lookup

Login Tips

ACH Enrollment Tips

Application Query Disbursal Query Allocation Lookup

Daily Allocation Reports

[BOT Counseling Report \(opens in Excel as .csv file\)](#)

School Allocation Reporting

The School Allocation Report is unavailable due to system maintenance. We apologize for the inconvenience as we work to perform some necessary upgrades. For questions or concerns, please contact Financial Aid Services at 1-844-792-2640.

Texas Higher Education Coordinating Board

Contact Us | THECB Home | HHLoans Home | Privacy and Security Policy | Compact with Texans

THECB - UAT A - HELMNet Build: 11/22/2019 8:33 AM

Reporting Search Options

[Loan Reporting](#) **School Loan Reports**

School Loan Reports

Selection Criteria

School Name	<input type="text" value="Texas Test University"/>
Program Year	<input type="text" value="Select a Program Year"/>
Report Name	<input type="text" value="Select a Report Name"/>
Loan Type	<input type="text" value="Select a Loan Type"/>

Available Reports

Selection Criteria

School Name

Program Year

Report Name

Loan Type

[Return To Loan Reporting](#)

Summary
Disbursed
Pending Future Disbursements
Pending Disb - Need Docs
Certified Apps in Process
Certified - No Funds
Uncertified Apps in Process
Uncertified Pre-approved Apps

| [THECB Home](#) |

THECB - UAT A-MOBILE - 02/21/2021

Summary Page

Report Name:
School Name:
Program Year:
Report Run:

Summary - CAL
Texas Test University 123456000
2019
03/10/2020 10:48 AM

[Export to CSV](#) [Export to PDF](#) [Print](#)

	CAL
Total Allocation ?	\$30,000,000.00
Disbursed ?	\$8,285,392.00
Pending Future Disbursements ?	\$0.00
Pending Disb. - Need Docs ?	\$10,000.00
Certified Apps in Process ?	\$8,876,796.00
Used Allocation ?	\$16,784,512.00
Remaining Allocation	\$13,215,488.00
Certified - No Alloc Funds Avail ?	\$0.00
Uncertified Applications in process	\$0.00
Uncertified Pre-Approved Applications	\$5,000.00

Automatic 90-Day Password Reset

The screenshot displays the 60x30TX website interface. The header features the 60x30TX logo and the text "Texas Higher Education Coordinating Board". A red box highlights the "Login\Create Account" link in the navigation menu. A modal window titled "Change Password" is open, displaying a message: "For security reasons, the use of your current password has expired. Please create a new password for your account." The modal includes input fields for "New Password" and "Confirm New Password", followed by a list of password requirements: case-sensitivity, minimum length of 9 characters, and inclusion of uppercase letters, lowercase letters, numbers, and symbols. A "Change Password" button is at the bottom right of the modal. The background shows a "Welcome" message and a "Tax information regarding loan interest paid" notice.

60x30TX
Texas Higher Education
Coordinating Board

Login\Create Account

Welcome

Tax information regarding loan interest paid (Form 1099-C) borrowers will receive a 1099-C statement for each loan year.

Effective May 17, 2019, Texas Higher Education Coordinating Board

Change Password

For security reasons, the use of your current password has expired. Please create a new password for your account.

New Password

Confirm New Password

Your password must follow the rules below:

- It is case-sensitive
- It is a minimum of 9 characters
- It must include at least:
 - one uppercase letter A-Z,
 - one lowercase letter a-z,
 - one number 0-9,
 - and one symbol \$ () | ~ = ' ` " _ + ! @ ? # % : ; , . -
- It cannot contain your user name
- It cannot be previously used


Change Password

Texas Higher Education Coordinating Board

Contact Us | THECB Home | HHL Loans Home | Privacy and Security Policy | Compact with Texans

HELMNet Build: 11/22/2019 8:33 AM

System Authorization Form



60x30TX
Texas Higher Education Coordinating Board

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@thehb.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 ▾				
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@thehb.state.tx.us.

SFAP Website Improvements

SFAP Webpage




Plan, Pay, & Complete College ▾

Institutional Resources & Programs ▾

Data & Reports ▾

Legislative & Media Resources ▾

About Us ▾



Public Community, Technical, & State Colleges

Public Universities & Health-Related Institutions

Private Postsecondary Institutions

Institutional Grant Opportunities

Funding & Facilities

Governing Board Member Training

Title IX Training

Star Award Program

Student Financial Aid Programs

Stay Connected

Student Financial Aid Programs

INSTITUTIONAL TOLL-FREE NUMBER: 1-844-792-2640

NOTE: The Financial Aid Services institutional phone line is available Monday – Friday from 8:00 a.m. – 5:00 p.m. except on holidays or during staff meetings. During these phone closure times, only online inquiries can be sent.


ONLINE INQUIRIES: [CONTACT US](#) (select “Financial Aid Question” option under Contact Reason)

CUSTOMER SATISFACTION [SURVEY](#): Take a moment to provide feedback.

News You Can Use

- The next monthly state financial aid webcast will be **Mar. 10, 2020** at 2 p.m. More information on how to join will be provided under Stay Connected à Webcast.
- The deadline to submit Good Neighbor Program recommendations is **Mar. 15, 2020**. More information on the submission process can be found under Stay Connected à Memos. Additional GNP information is also available under Program Resources à Exemption & Waivers.
- The FY 2020 Financial Aid Database report manual is now available under Online Resources.
- The “Institutions” webpage was permanently removed from the HHLoans website as of Jan. 9, 2020. Institutions can find all resource information previously hosted on the HHLoans website by accessing the SFAP Loan Programs webpage.
- Loan reports accessed through the HelmNet online portal are still unavailable. Please submit a request through [CONTACT US](#) for these reports until further notice.

MARCH 10, AT 2PM



[Click to join Skype Meeting](#)

Note: The webcast is recorded so attendees should be prepared to mute any microphones or headsets when joining to ensure background noise is minimized.

Webcast Archives

The screenshot shows the 60x30TX website with a navigation bar at the top containing the logo and links for 'Plan, Pay, & Complete College', 'Institutional Resources & Programs', 'Data & Reports', and 'Legislative & Media Resources'. A left sidebar lists various categories, with 'Student Financial Aid Programs' expanded to show 'Webcast' and 'Webcast Archives'. The main content area is titled 'Webcast Archives' and includes a message about missing webcasts, a link to a survey, and a list of past webcasts with expandable links.

60x30TX Plan, Pay, & Complete College Institutional Resources & Programs Data & Reports Legislative & Media Resources

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

Webcast Archives

Did you miss a webcast? Don't worry you can still watch the recorded version. Below are links to all of our past webcast and a copy of the presentation.

Provide us your feedback and ideas for an upcoming webcast by completing our [Short Survey](#).

- + [State Financial Aid Webcast February 11, 2020](#)
- + [State Financial Aid Webcast October 22, 2019](#)
- + [State Financial Aid Webcast September 10, 2019](#)
- + [State Financial Aid Webcast August 13, 2019](#)
- + [State Financial Aid Webcast July 9, 2019](#)
- + [State Financial Aid Webcast June 11, 2019](#)
- + [State Financial Aid Webcast May 14, 2019](#)
- + [State Financial Aid Webcast April 9, 2019](#)
- + [State Financial Aid Webcast March 12, 2019](#)

Webcast Archives

Did you miss a webcast? Don't worry you can still watch the recorded version. Below are links to all of our past webcast and a copy of the presentation.

Provide us your feedback and ideas for an upcoming webcast by completing our [Short Survey](#).

+ [State Financial Aid Webcast February 11, 2020](#)

Topics of discussion

- State FA Resource Updates
- Upcoming Deadlines & Events
- Exemption & Waiver Resources
- College For All Texans website updates
- TEC 54.351 vs. TEC 54.354
- Good Neighbor Program (GNP) online recommendation process

[State Financial Aid Webcast February 11, 2020 \[Video\]](#)

[State Financial Aid Webcast February 11, 2020 \[PDF\]](#)

+ [State Financial Aid Webcast October 22, 2019](#)

+ [State Financial Aid Webcast September 10, 2019](#)

Online Training Modules

The screenshot displays the 60x30TX website interface. The top navigation bar includes the 60x30TX logo, a dropdown menu for 'Plan, Pay, & Complete College', a greyed-out 'Institutional Resources & Programs' dropdown, a 'Data & Reports' dropdown, a 'Legislative & Media Resources' dropdown, an 'About Us' dropdown, and a search bar. The left sidebar lists various categories: 'Public Community, Technical, & State Colleges', 'Public Universities & Health-Related Institutions', 'Private Postsecondary Institutions', 'Institutional Grant Opportunities', 'Funding & Facilities', 'Governing Board Member Training', 'Title IX Training', 'Star Award Program', 'Student Financial Aid Programs' (highlighted in dark blue), and 'Stay Connected'. The main content area is titled 'Learning Resources' and features a section for 'FY 2018 Financial Aid Database Report Training' with a link to 'Module 1: 2017-18 Changes [Video]'. Below this is 'HELMNET Training' with links to 'Login Process Module [PPT]', 'Basic Navigation Module [PPT]', 'Loan Certification Module [PPT]', 'Pre-Disbursement Changes Module [PPT]', and 'Inquiry Options Module [PPT]'. A link for 'Online Training Request Form' is also present. A large 'COMING SOON' message is centered in the main area.

60x30TX Plan, Pay, & Complete College ▾ Institutional Resources & Programs ▾ Data & Reports ▾ Legislative & Media Resources ▾ About Us ▾ Search

Public Community, Technical, & State Colleges

Public Universities & Health-Related Institutions

Private Postsecondary Institutions

Institutional Grant Opportunities

Funding & Facilities

Governing Board Member Training

Title IX Training

Star Award Program

Student Financial Aid Programs

Stay Connected

Learning Resources

FY 2018 Financial Aid Database Report Training

- [Module 1: 2017-18 Changes \[Video\]](#)

HELMNET Training

- [Login Process Module \[PPT\]](#)
- [Basic Navigation Module \[PPT\]](#)
- [Loan Certification Module \[PPT\]](#)
- [Pre-Disbursement Changes Module \[PPT\]](#)
- [Inquiry Options Module \[PPT\]](#)

[Online Training Request Form](#)

COMING SOON

2021-22 TASFA Feedback

Texas Application for State Financial Aid – TASFA

Give your feedback to improve the application by April 10, 2020.

Possible changes for 2021-22:

- Adding Adjusted Gross Income (AGI)
- Taxes Paid

2020-21 TASFA
Texas Application for State Financial Aid July 1, 2020 – June 30, 2021

The Texas Application for State Financial Aid (TASFA) collects information to help determine eligibility for state (or institutional) financial aid programs administered by institutions of higher education in the state of Texas. Students classified as Texas Residents who are not eligible to apply for federal financial aid using the Free Application for Federal Student Aid (FAFSA) are encouraged to complete the TASFA. To review the FAFSA filing requirements, visit www.fafsa.ed.gov or visit the financial aid office at the institution you plan to attend for the 2020-21 award year. Note: The federal application covers federal and state financial aid opportunities. If you meet the FAFSA filing requirements, then you should submit a completed FAFSA. You do not need to complete both the FAFSA and TASFA.

The Texas state priority deadline for many institutions of higher education is January 15, 2020 for the 2020-21 award year. It is recommended that applicants complete and submit this application and any other required documentation to the financial aid office on or before January 15. Note: Texas residency and final eligibility for financial aid can only be determined by the institution that you plan to attend.

To complete this application, answer each item within the applicable sections. For clarification on specific items, refer to the **TASFA Notes on pages 6-8**. If you have further questions, contact the financial aid office at your institution.

SECTION ONE: STUDENT INFORMATION (See Notes for questions 5-6)

1. Last Name	2. First Name	3. M.I.
4. Date of Birth	5. Social Security Number (e.g., DACA) <input type="checkbox"/> N/A	6. College Student ID #
7. Permanent Mailing Address		
8. City	9. State	10. Zip Code
12. Email Address		11. Phone Number
13. What will your high school completion status be when you begin college in the 2020-21 school year?		Alternate Email:
<input type="checkbox"/> High school diploma <input type="checkbox"/> Homeschooled (Skip to Question 16)		<input type="checkbox"/> None of these (Skip to Question 18)
<input type="checkbox"/> General Educational Development (GED) certificate (Skip to Question 16)		
14. High School Name (If applicable)	16. HS State (If applicable)	17. Date of Graduation (HS or GED)
15. High School City (If applicable)		
18. Will you have your first bachelor's degree before you begin the 2020-21 school year? <input type="checkbox"/> Yes <input type="checkbox"/> No		
19. What will your college grade level be when you begin the 2020-21 school year?		20. What degree or certificate will you be working on when you begin the 2020-21 school year?
Never attended college (No college credits) <input type="checkbox"/>		1st bachelor's degree <input type="checkbox"/>
1st year undergraduate <input type="checkbox"/>		2nd bachelor's degree <input type="checkbox"/>
2nd year undergraduate/sophomore <input type="checkbox"/>		Associate degree (occupational, technical, general education, or transfer program) <input type="checkbox"/>
3rd year undergraduate/junior <input type="checkbox"/>		Certificate or diploma <input type="checkbox"/>
4th year undergraduate/senior <input type="checkbox"/>		Teaching credential (nondegree program) <input type="checkbox"/>
5th year/other undergraduate <input type="checkbox"/>		Graduate or professional degree <input type="checkbox"/>
1st year graduate/professional <input type="checkbox"/>		Other/undecided <input type="checkbox"/>
Continuing graduate/professional or beyond <input type="checkbox"/>		

2020-21 Texas Application for State Financial Aid (TASFA) Page 1

SUBMITTING TASFA FEEDBACK

Use the "Contact Us" link

To ensure inquiries are routed correctly:

- Select **Institution**
- Enter your **Institution's Name**
- Select **Financial Aid Question**
(regardless of the reason for the inquiry)

Student Financial Aid Programs Information (SFAP) Webpage

INSTITUTIONAL TOLL-FREE NUMBER: 1-844-792-2640

ONLINE INQUIRIES: **CONTACT US** (select "Financial Aid Question" option under contact reason)

Contact Us

An asterisk * by the field indicates a required field!

Received From* INSTITUTION ▾

Institution College of Higher Education

Contact Reason* -- please select an item -- ▾

Description* -- please select an item --
* Student Loan Question
* Financial Aid Question
* Student Complaint Against a Higher Education Institution
Academic Policy-Graduate
Academic Policy-Health Professions Programs
Academic Policy-Undergraduate
Accountability System
Accreditations status other than at Texas Public School
Adult Basic Education Programming
Applying to College
CBM Reporting
Complaint Against THECB
Data Analysis
Developmental Education
Educator Preparation
Employment Opportunities at THECB
External Relations Inquiry
Facilities Inventory and Projects
Formula Funding

4000 characters max

description. If you have a question about the last four digits of your SSN instead.

Is this a complaint

Contact Preference

Salutation*

First Name*

Last Name*

Financial Aid Database Updates 2019-20

Example of data from FAD...

Although more than \$12 billion in student financial aid was awarded from federal, institutional, private, and state funding sources in FY 2018, there was a significant amount of unmet financial need among students attending Texas institutions of higher education. The average annual amount needed per student to cover the gap between undergraduate education costs and student resources (Expected Family Contribution [EFC] and financial aid) was:

- \$7,579 for students attending public two-year institutions,
- \$6,258 for students attending public universities and health-related institutions (HRIs), and
- \$8,616 for students attending private or independent institutions.

Source: Report on Student Financial Aid – FY 18 <http://reportcenter.theccb.state.tx.us/reports/data/report-on-student-financial-aid-in-texas-higher-education-for-fy-2018/>

FY 2019 FAD review revealed:

- Inflated COA
- Enrollment hours
- Ministry-related degree
- Hardship/Justification

Reminders and Updates:

- **Reminder:** Reporting **cycle one** deadline is **April 17, 2020**.
- **Clarification:** Reporting **cycle one** requires all students to be reported under option "3 – Reporting Cycle 1" and not option "0 - Not a recipient" for Data Elements #110 - #112
- **Update:** Changes to the 2019-20 manual for reporting **cycle two** will include additional notes and alert boxes for clarification.
- **Update:** For 2019-20, reporting **cycle two** will require only a "Warning" for reconciliation.

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.

Questions?