

State Financial Aid Monthly Webcast

May 24, 2022

Topics of Discussion



FY 2023
Program
Guidelines Grant
Updates

User Access
Annual Review

Online TASFA
Updates

Deadlines and
Reminders

Questions

FY 2023 Program Guidelines

Grant Updates

Annual Updates



Program Years



Award Amounts



Deadline Dates



Priority EFC



TEC and TAC

ALERT: Priority EFC

The **priority EFC** set by the THECB should serve as a method for prioritizing initial year awards for eligible students and is not an eligibility requirement to receive an award. The calculated priority EFC for 2022-23 is \$6,454.

2022-23 Program Guidelines Toward EXcellence, Access, & Success Grant (TEXAS Grant)

**Texas Higher
Education**
COORDINATING BOARD

PROGRAM RULES AND STATUTES

Texas Program Statutes	Texas Education Code TEC, Title 3, Chapter 56, Subchapter P [PDF]
Texas Program Rules	Texas Administrative Code TAC, Title 19, Chapter 22, Subchapter A [PDF] TAC, Title 19, Chapter 22, Subchapter M [PDF]

2022-23 AWARD MAXIMUMS

Students may be issued a total of three awards (fall, spring, and summer) in an academic year.

INSTITUTION TYPE	SEMESTER MAX	YEAR MAX (fall, spring & summer)	TARGET SEMESTER MAX	TARGET YEAR MAX (fall, spring & summer)
PUBLIC UNIVERSITIES, HRIs	\$5,379	\$16,137	\$2,500	\$7,500

Enhancement: Grant Payment Portal Instructions



Registration Process



Requesting Funds



Canceling a Request



Returning Funds



Student Count Changes



CBPASS GRANT PAYMENT PORTAL INSTRUCTIONS

REGISTRATION PROCESS

REQUESTING FUNDS

CANCELING A REQUEST

RETURNING FUNDS

STUDENT COUNT CHANGES

The **Student Count** can be increased or decreased at any point by the institution during the current award year.

- **To increase the Student Count:**

- Enter the number of students being added (the difference) under the **Request Funds tab**.
- Enter \$0 for the amount of funds being requested.

Example: The Student Count reported in GPP is **100** students, but the institution has actually paid **120** students grant funds for the award year. To add the additional 20 students into the GPP, enter **20** in the Student Count on the Request Funds tab and **\$0** for the amount of funds being requested. This will increase the total Student Count from 100 to 120.

- **To decrease the Student Count:**

- Enter the number of students being reduced (the difference) under the **Return Funds tab**.
- Enter \$0 for the amount of funds being returned and a comment to clarify changes to the Student Count.

Example: The Student Count reported in GPP is 100 students, but the institution has only paid 80 students grant funds for the award year. To reduce the total reported in the GPP, enter 20 in the Student Count on the

Enhancement: Added Clarity

- ***Eligibility*** section for TEXAS Grant to expand military pathway language based on TAC rules.
- ***Hardships*** section in the three grant programs to better align with TAC rules.

Selective Service Statement

Memo was sent Sept. 29, 2021 to communicate:

- Institutions will no longer be required to collect “proof” of registration or exemption from students.
- Institutions are not required to verify the accuracy of the statement against external databases or other resources if there is no conflicting information.

SELECTIVE SERVICE STATEMENT OF REGISTRATION STATUS

In accordance with [Texas Education Code, Section 51.9095](#), male students must file a Selective Service Statement of Registration Status with their institution or other entity granting financial assistance. For more information about the Selective Service System, visit [sss.gov](#).

Please mark **one** option below:

<input type="checkbox"/> I was born female and not required to register.	<input type="checkbox"/> I was born male and am EXEMPT from registration because: (please briefly explain why you are exempt in the box below.) <div style="border: 1px solid black; height: 100px; width: 100%;"></div>
<input type="checkbox"/> I was born male and am under the age of 18 and not currently required to register.	
<input type="checkbox"/> I was born male and am REGISTERED with the Selective Service.	
<input type="checkbox"/> I was born male and am over the age of 18. I am not registered with Selective Service and I am not exempt from registration with Selective Service.	

I, _____, hereby certify that the Selective Service status statement provided above is true and accurate.

Student ID: _____ Signature: _____ Date: _____

Complete and return to the Financial Aid Office at your institution of higher education.

Selective Service Statement of Registration Status As of 09/28/2021

Statement of Student Eligibility

Memo was sent Sept. 29, 2021 to communicate:

- Institutions that collect statements for the TEXAS Grant and TEOG program need to revise any language that limits this requirement to offenses only related to controlled substance offenses to also include all felony convictions.
- Institutions are only required to collect the statement and are not required to verify the accuracy of that statement against external databases or other resources if there is no conflicting information.

Statement of Student Eligibility

Have you ever been convicted of a felony?
 Yes No

Have you ever been convicted of an offense under Chapter 481, Health and Safety Code (Texas Controlled Substances Act), or under any the law of another jurisdiction involving a controlled substance as defined by Chapter 481, Health and Safety Code?
 Yes No

I hereby certify that the information provided in this statement is true and correct to the best of my knowledge. I understand that if I fail to provide accurate information, I may be required to reimburse the institution and penalties may be imposed. I also understand that it my responsibility to inform the financial aid office if my status concerning this statement of eligibility changes at any time while attending this institution.

Student Full Name: _____ Date: _____

Student Signature: _____

Child Support Arrearages

Under the [Texas Family Code, Title 5, Section 231.006](#):

“INELIGIBILITY TO RECEIVE STATE GRANTS OR LOANS OR RECEIVE PAYMENT ON STATE CONTRACTS. (a) A child support obligor who is more than 30 days delinquent in paying child support and a business entity in which the obligor is a sole proprietor, partner, shareholder, or owner with an ownership interest of at least 25 percent is not eligible to:

- (1) receive payments from state funds under a contract to provide property, materials, or services; or
- (2) receive a state-funded grant or loan”

ALERT: Child Support Arrearages

Per [Texas Family Code, Title 5, Section 231.006](#), a student who is obligated to pay child support and is more than 30 days delinquent is not eligible to receive a state-funded grant.

Institutions determine how to best comply with this state requirement and should work with their legal counsel on questions related to this statutory mandate.

Authority to Transfer

- The THECB approved an amendment to TAC, Title 19, Section 22.11 during their quarterly meeting held on April 28, 2022.
- The allowable amounts for the Authority to Transfer Funds process have changed from 10% to **25%** and from \$20,000 to **\$60,000**.
- Institutions must submit an online [FY 2022 Authority to Transfer Request](#) by July 1, 2022.

User Access Annual Review

Instructions

User Access Annual Review

Memo was sent May 17, 2022

For compliance and security purposes, institutions are required each year to verify the THECB's list of user accounts for the three financial aid portals:

- Higher Education Loan Management System (HelmNet)
- Coordinating Board Pass (CBPass)
- MOVEit DMZ

Portal accounts that have not been used in over 12 months will be deleted to ensure security. The Director of Financial Aid must submit a new user access form if the staff member requires access in the future.

Deadline: June 10, 2022

Step 1: Review User Account Spreadsheet



2022 USER ACCESS ANNUAL REVIEW

THE DEADLINE TO COMPLETE THE REVIEW AND SUBMIT UPDATED USER INFORMATION IS JUNE 10, 2022.

To comply with the Texas Higher Education Coordinating Board (THECB) privacy and security policy, the Director of Financial Aid must complete these steps:

1. Filter and review your institution's user accounts for the CBPass, MOVEit, and HelmNet web portals listed below. Determine whether updates are needed. Determine whether updates are needed.
2. If updates are necessary, complete and submit a [User Access Form - Annual Review](#).
3. All institutions must complete the required [Online Verification Form](#).

Web Portal	Institution	First Name	Last Name	Email Address
MOVEit	ABC University	Minnie	Mouse	minniemouse@abc.edu
MOVEit	ABC University	Donald	Duck	donaldduck@abc.edu
HelmNet	ABC University	Pluto	Dog	plutodog@abc.edu
HelmNet	ABC University	Daffy	Duck	daffyduck@abc.edu
HelmNet	ABC University	Mickey	Mouse	mickeymouse@abc.edu
MOVEit	123 University	Minnie	Mouse	minniemouse@123.edu
MOVEit	123 University	Donald	Duck	donaldduck@123.edu
CBpass_FAD	123 University	Pluto	Dog	plutodog@123.edu
CBpass_Grant_Payment	123 University	Daffy	Duck	daffyduck@123.edu
HelmNet	123 University	Mickey	Mouse	mickeymouse@123.edu
MOVEit	123 University	Life	Happens	lifehappens@123.edu

Step 2: Complete User Access Form

If updates are needed, complete a User Access Form – Annual Review reflecting the revisions to your institution’s user accounts.

Do not email the user access form for the annual review but instead, institutions will upload a signed copy in Step 3.

Purpose

The purpose of this form is to provide the requirements in which an institution may:

- Request, remove, and update credentials for the **Higher Education Loan Management System (HelmNet)**.
- Remove application access to the Grant Payment Program (GPP), Financial Aid Database (FAD), and the Good Neighbor Program (GNP) within the **Coordinating Board Identification (CBPass)** web portal.
- Update authorized **MOVEit DMZ** designees.

Requirements

Institutions must implement procedures to ensure that only authorized staff have access to the THECB secure web portals.

- Users are responsible for protecting the confidentiality of their usernames and passwords.
- User credentials for **CBPass** applications and **HelmNet** must be removed using this form whenever access is no longer needed (e.g., a role change, or a staff member’s departure).
- Updates to contact information, such as a change in name, title, or email, must be made to a user’s profile.
 - Changes to a user’s profile in **CBPass** are made via the CBPass web portal.
 - Changes to a user’s profile in **HelmNet** are made via this form.
- **MOVEit DMZ** is managed solely by the Director of Financial Aid, and institutions are issued only one ID and password. New directors are automatically designated the *Authorizing Official* of MOVEit DMZ. Directors are required to update the system password each time a new designee is assigned, a designee position no longer requires portal access, or a designee no longer works in the department or at the institution. Directors are required to assign *at least one* designee.

Institution Contact Information		
Institution Name:		FICE Code:
Certifying Official (Director of Financial Aid or equivalent)		
First Name:	Last Name:	Phone:
Title:		Email:

Check box when a **NEW or Interim** Director is completing this form.

When the above box is checked, the THECB will remove the prior Director’s access to all portals and automatically issue a new MOVEit DMZ password for security purposes.

Institution Authorization	
I certify that _____ shall implement procedures to ensure 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.	
Certifying Official Signature: _____	Date: _____

Step 3: Complete Online Verification Form

Complete and submit the required User Access Review - Online Verification Form.

You must verify one of the following:

- **User list is *correct*:**
 - No changes required
- **User list is *incorrect*:**
 - Must upload User Access – Annual Review form

Texas Higher Education Coordinating Board

User Access Annual Review - Online Verification Form 2022

Deadline: June 10, 2022

Instructions
Financial Aid Directors should follow these steps to complete the annual User Access Review process:

Step 1. Review your institution's user accounts listed on the [User Access Spreadsheet](#) for the three web portals. Determine whether updates are needed.

Step 2. If updates are needed, complete a [User Access Form – Annual Review](#) reflecting the revisions to your institution's user accounts.

Step 3. Complete and submit the required User Access Annual Review - Online Verification Form below.

Institution Type *
Select

Verification Statement *

USER LIST CORRECT: I have reviewed the list of users for HelmNet, CBPass, and MOVEit, and I confirm that the information listed in the User Access Spreadsheet is CORRECT and does NOT require any updates or changes.

USER LIST INCORRECT: I have reviewed the list of users for HelmNet, CBPass, and MOVEit, and I confirm that the information listed in the User Access Spreadsheet is INCORRECT and will upload changes below.

Name of Director of Financial Aid *
[Text Field]

Phone Number of Director of Financial Aid *
[Text Field]

Email of Director of Financial Aid *
[Text Field]

Date *
[Date Picker]

Questions?
If you have questions, email Financial Aid Services through [CONTACT US](#) select 'Financial Aid Question' as the Contact Reason).

Important!
Please select "Send me a copy of my responses" to receive a confirmation of your submission.

Send me a copy of my responses

Submit

[Privacy Notice](#) | [Report Abuse](#)

2023-24 TASF A

Updates

Texas Administrative Rules: TASFA

Memo was sent May 10, 2022:

- Institutions participating in state financial aid programs **must** accept the data generated by the completion of this online TASFA.
- Institutions **may** accept the paper TASFA from applicants who do not have access to the necessary technology to complete the online TASFA.
- Institutions **can** require an applicant to submit additional information with data received on the TASFA.

Texas Administrative Code

TITLE 19	EDUCATION
PART 1	TEXAS HIGHER EDUCATION COORDINATING BOARD
CHAPTER 22	STUDENT FINANCIAL AID PROGRAMS
SUBCHAPTER A	GENERAL PROVISIONS
RULE §22.6	Applying for State Financial Aid

(a) Priority deadline:

(1) All general academic teaching institutions shall use January 15 as the priority application deadline to receive state financial aid.

(2) The priority deadline is not to serve as a determination of eligibility for state financial aid, but otherwise eligible students who apply on or before the deadline shall be given priority consideration for available state financial aid before other applicants.

(b) Texas Application for State Financial Aid (TASFA):

(1) The TASFA collects data necessary for determining state financial aid eligibility for those applicants classified as Texas residents, as outlined in Chapter 21, Subchapter B of this Part, who are not eligible to apply for federal financial aid using the Free Application for Federal Student Aid.

(2) Beginning with the financial aid application cycle for academic year 2023-2024 and thereafter, the online TASFA available through the ApplyTexas website is the sole, acceptable online TASFA. All institutions participating in financial aid programs covered by this chapter must accept the data generated by the completion of this online TASFA.

(3) Beginning with the financial aid application cycle for academic year 2023-2024 and thereafter, the TASFA document available through the ApplyTexas website is the sole, acceptable printable version of the TASFA, which institutions may accept from applicants who do not have access to the necessary technology to complete the online TASFA.

(4) An institution is not prohibited from requiring an applicant to submit additional information to accompany the data received via the TASFA.

(c) Authority for this section is provided in Texas Education Code, Chapter 56, Section 56.008 and Chapter 61, Section 61.07762.

Source Note: The provisions of this §22.6 adopted to be effective August 27, 2018, 43 TexReg 5504; amended to be effective May 19, 2022, 47 TexReg 2860

[TAC, Title 19, Chapter 22, Subchapter A, Rule 22.6](#)

TASFA Updates

Development

- Refining help icons throughout the application.
- Mirroring the FAFSA questions where possible.

Testing

- Internal user acceptance testing (UAT) is in progress.
- External UAT will be completed over the summer.
- Institutions will be involved in testing of file transmission in MOVEit.

Demographics

Complete each of the questions in the four sections below. Click the **i** icon to read available help instructions.

* 1) Your Last Name **i** * 2) Your First Name **i**

LAST NAME FIRST NAME

3) Your Middle Initial * 4) Date Of Birth **i**

OPTIONAL mm/dd/yyyy

Field cannot be empty

A blue arrow points from the help icon in the 'Your First Name' field to a callout box.

Click the **i** icon

Enter your full, legal last name. Do not use nicknames or abbreviations since this information will be used to match your application with your official record if you enroll in a college.

Close

Find:

Name	Size/Contents	Creator	Created	Actions
Parent Folder				
NetPriceCalc			3/4/2021 9:51:16 AM	
Grant_Output	4 1		5/3/2016 7:18:20 PM	
FADS_Output	361		5/3/2016 7:18:11 PM	
Loans_Output	2246		4/29/2016 2:49:41 PM	
TASFA_Output	361		10/1/2022 9:00:00 PM	

Selected File/Folder Actions:

Delete Download

Enter destination folder Copy Move Advanced Copy/Move Options

TASFA Updates

Data Transmission

- The TASFA File Layout was sent to institutions May 10, 2022.
 - [TASFA FY 2024 File Layout](#)
 - [TASFA FY 2024 File Layout Memo](#)
- The TASFA data file will be sent to institutions in a **Fixed-Length** text format.
- The document was created to mirror the ISIR Record Layout, where possible.
- It includes a header, footer and detailed applicant record to provide the start and end positions for the data collected from each question or input on the TASFA.
- TASFA files will be sent daily using the THECB's online portal, MOVEit DMZ, to the institution's dedicated TASFA_Output folder.

Header Record

The **Header Record** contains information to identify the type of data in the file.

Data Element	Start	End	Length	Field Description	Justified
TASFA File Name	1	5	5	"TASFA" included.	Left
Academic Year of Application	6	13	8	Both years without space or punctuation included: (CCYYCCYY) Example: 20232024	Right
Institution's FICE Code	14	19	6	Leading zeros included.	Right
Submission Date	20	27	8	Month, Day, Year in format: MDDYYYY	Right
Applicant Record Count	28	32	5	The number of applicant records in the file. Will not include header or trailer records.	Right

Detailed Applicant Record

Field #	TASFA #	Start	End	Length	Field Name	Valid Content	Justified	Skip Logic
1.	1	1	30	30	STUDENT LAST NAME	<ul style="list-style-type: none"> Numbers 0 to 9 Uppercase letters A to Z Blank space(s) (period) ' (apostrophe) - (hyphen) 	Left	Required
						<ul style="list-style-type: none"> Numbers 0 to 9 Uppercase letters A to Z 		

The screenshot shows a file management interface with a search bar at the top. Below it is a list of folders and files. The 'TASFA_Output' folder is highlighted with a red box. Below the list are buttons for file actions: Delete, Download, Copy, Move, and Advanced Copy/Move Options.

Name	Size/Contents	Creator	Created	Actions
Parent Folder				
NetPriceCalc			3/4/2021 9:51:16 AM	
Grant_Output	4 1		5/3/2016 7:18:28 PM	
FADS_Output	361		5/3/2016 7:18:11 PM	
TASFA_Output	361		10/1/2022 9:00:00 PM	

TASFA File Layout Overview

TASFA File Layout Overview

Beginning with the financial aid application cycle for academic year 2023-2024 and thereafter, the TASFA will be linked through ApplyTexas (both paper and electronic versions).

All institutions participating in state financial aid programs **must** accept the data generated by the completion of this online TASFA. Institutions may accept the paper TASFA from applicants who do not have access to the necessary technology to complete the online TASFA. Please note that institutions can require an applicant to submit additional information to accompany the data received on the TASFA (see [Texas Administrative Code, Section 22.6](#)).

TASFA Data Collection

To collect the data for the online TASFA, an applicant will create their account through a dedicated TASFA landing page which will be linked through ApplyTexas. Once they log into their account and access the main **Application** page, they will enter data in the following tabs:

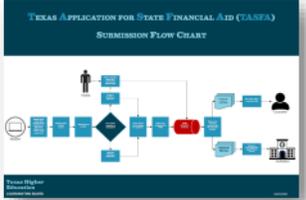
- Instructions (informational only)
- Student
- Dependency
- Parent (if applicable)
- College
- Signature

Additional Information:

- The data collected on the TASFA will not be validated by the Texas Higher Education Coordinating Board (THECB) against external databases.
- Applicants will not have the ability to upload or submit documentation using the online TASFA and will need to send corresponding paperwork to the institutions directly.
- Once submitted, the application is locked, and corrections cannot be made. An applicant can add more colleges for submission.
- Each institution will use the data provided by the THECB to calculate an expected family contribution (EFC).
- The THECB will only send applications to the institution that have been signed and submitted; partially completed applications will not be provided.

TASFA Submission Flow

Click on the infographic below to review the TASFA Submission Workflow.



TASFA FY 2024 File Layout As of 5/10/2022 1

- The data collected on the TASFA will **not** be validated by the THECB against external databases.
- Applicants will **not** have the ability to upload or submit documentation using the online TASFA and will need to send corresponding paperwork to the institutions directly.
- Once submitted, the application is **locked**, and corrections cannot be made. An applicant can add more colleges for submission.
- Each institution will use the data provided by the THECB to calculate an expected family contribution (EFC).
- The THECB will only send applications to the institution that have been signed and submitted; partially completed applications will **not** be provided.

File Layout Format

Standards for field position types:

- **Numeric Positions** are right justified.
 - If the total positions are not needed for the numeric entry, leading zeros will be included in the file.
 - *Example:*
 - Field allows 9 numbers to be entered
 - Amount entered by user: \$1,000
 - File will include: 000001000
- **Alphanumeric Positions** are left justified.
- **Blank Positions** are left justified.
 - If a field is skipped because it is **Optional** or conditional, blank spaces will be included in the file to account for the applicable positions.

Field #	TASFA #	Start	End	Length	Field Name	Valid Content	Justified	Skip Logic
						4 = Married - filed separate return 5 = Qualifying widow(er) 6 = Don't know		If option "Not going to file" on question 22 is selected, questions 23 - 27 are hidden .
30.	25	374	374	1	SCHEDULE 1 WITH FILED TAX RETURN	1 = Yes 2 = No 3 = Don't know	Right	Conditional Field <ul style="list-style-type: none"> ○ If option "Already completed" or "Will file" from question 22 is selected, questions 23 - 27 are displayed. ○ If option "Not going to file" on question 22 is selected, questions 23 - 27 are hidden.
31.	26	375	381	7	STUDENT (AND SPOUSE) ADJUSTED GROSS INCOME	-9999999 to 9999999	Right	Conditional Field <ul style="list-style-type: none"> ○ If option "Already completed" or "Will file" from question 22 is selected, questions 23 - 27 are displayed. ○ If option "Not going to file" on question 22 is selected, questions 23 - 27 are hidden.
32.	27	382	388	7	STUDENT (AND SPOUSE) INCOME TAX	0000000 to 9999999	Right	Conditional Field <ul style="list-style-type: none"> ○ If option "Already completed" or "Will file" from question 22 is selected, questions 23 - 27 are displayed. ○ If option "Not going to file" on question 22 is selected, questions 23 - 27 are hidden.

STUDENT (AND SPOUSE) INCOME TAX	0000000 to 9999999	Right	Conditional Field <ul style="list-style-type: none"> ○ If option "Already completed" or "Will file" from question 22 is selected, questions 23 - 27 are displayed. ○ If option "Not going to file" on question 22 is selected, questions 23 - 27 are hidden.
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TASFA Data Processing

- It is **not required** that institutions are able to import the data provided in fixed length file by the October 2022 launch.
- File Layout can be used by institutions to **begin** conversations with software vendors to determine future import options.
- The THECB is pursuing additional file formats to transmit data (e.g., .csv format) so schools can consume data more easily.
- A report is also being created to provide institutions a running listing of submitted TASFAs at their institution.



Deadlines and Reminders

Deadlines and Reminders

Deadlines

- 10-Day Review for Preliminary Allocations – June 6, 2022
 - TEXAS Grant, EAE, WSMP, TCWS
- User Access Annual Review – June 10, 2022
- Authority to Transfer – July 1, 2022

Coming Soon

- FY 2023 Additional Program Guidelines
- Exemption and Waiver updates

General Reminders

- Financial Aid Database (FAD) - Cycle Two – First day to submit files – June 15, 2022
- FY 2023 Grant Guidelines posted on SFAP webpage → Program Resources
- Summer Institutional Calendar posted on SFAP webpage → Stay Connected

Contact Student Financial Aid Programs

The following phone lines are available for borrower and the public:

Borrower Services

- Student Borrowers (Cosigners): (800) 242-3062

Texas Financial Aid Information Center

- Public Line: (888) 311-8881

Contact Financial Aid Services in one of the following ways:

FAS Institutional Phone Line

- Institutions Only: (844) 792-2640

Submit inquiries online through the [CONTACT US](#) web form.



Phone lines –
Hours of Operation:
Mon-Fri
8 a.m. to 5 p.m.
(Closed 12-1 daily)

Submit a CONTACT US

- To ensure inquiries are routed correctly, complete these steps:
- Select “**Institution**” in Received From box
- Enter the institution’s full name
- Always select “**Financial Aid Question**” as the Contact Reason
- Provide the best **direct phone number**

Texas Higher Education Coordinating Board

Contact Us

*An asterisk * by the field indicates a required field!*

Received From*

Institution

Contact Reason*

Description*
4000 characters max

Please do NOT include your full Social Security Number inside the issue description. If you have a question about the status of a new loan application, accounts in repayment, or deferments, please use the last four digits of your SSN instead.

Is this a complaint No Yes

Contact Preference E-MAIL LETTER PHONE

Salutation*

First Name*

Last Name*

E-mail*

Phone (10-digit) Phone Ext

Mail Address

Mail Address2

Mail Address3

City

State Zip Code (5-digit)

| [Help](#)

A woman in a white lab coat is looking at a laptop screen in a laboratory setting. The image is overlaid with a dark teal background and a thin yellow circular line on the left and right sides.

Texas Higher Education

COORDINATING BOARD

Questions?