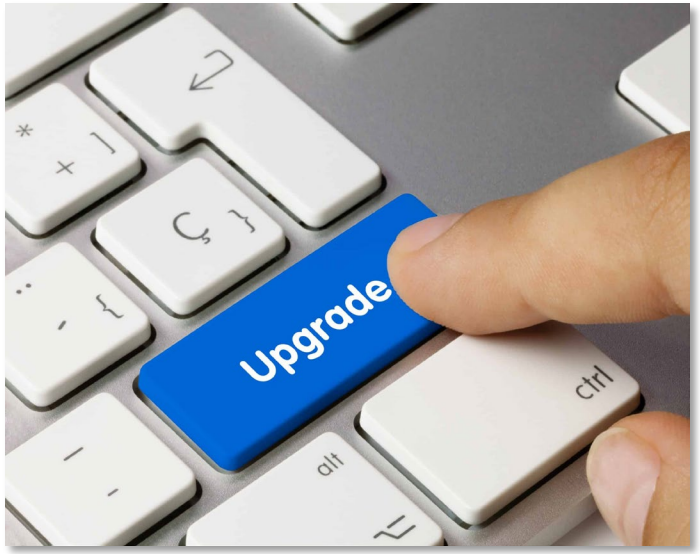
Texas Higher Education
COORDINATING BOARD

State Financial Aid Monthly Webcast

August 24, 2023

Topics of Discussion



- 2023-24 (FY 2024) Program Guidelines
- Introduction to the Grant and Aid Processing Platform (GAPP)
- Deadlines and Reminders
- Questions?

2023-24 (FY 2024) Program Guidelines

Annual Updates

Annual Updates

- Program Years
- Deadline Dates
- TEC and TAC

Annual Updates

Program Years

Deadline Dates

TEC and TAC

Authority to Transfer (TAC, Title 19, Section 22.11)

Institutions participating in a combination of either Texas College Work-Study (TCWS), or Work-Study Student Mentorship Program (WSMP) and TEG may transfer up to **25%** of the institution's total annual program allocation or **$60,000** (whichever is less) between programs within the relevant fiscal year. This threshold applies to the program from which the funds are transferred.

Transfer requests are submitted by the institution to the THECB using an online Authority to Transfer form. An official notification will be sent to institutions during the award year. Institutions requesting a transfer of funds must submit a request by **July 1, 2024**.

Processing Funds

Each biennium (the two-year state budget period), funds not requested in the first year will be carried forward by the THECB on behalf of the institution for use in the second year. Any funds not requested in the second year of the biennium become available for redistribution as determined by the THECB.

Institutions can **begin submitting** requests for funding on **August 15, 2023**. The THECB will **begin processing** funds after **September 1, 2023**. Institutions have through **August 1, 2024** to request program funds. An official notification will be sent to institutions in the summer to provide instructions on how to request funds for FY 2024.

Annual Updates

- Program Years
- Deadline Dates
- TEC and TAC

CONTACT FINANCIAL AID SERVICES	
By phone: (844) 792-2640	
Contact us by completing an online inquiry form and select "Financial Aid Question" as the Contact Reason.	
PROGRAM RULES AND STATUTES	
Texas Program Statutes	Texas Education Code TEC, Chapter 56, Subchapter M [PDF]
Texas Program Rules	Texas Administrative Code TAC, Title 19, Chapter 22, Subchapter A [PDF] TAC, Title 19, Chapter 22, Subchapter L [PDF]

Overarching Program Updates

- ***Selective Service Statement*** section has a new comment to clarify that institutions can use a prior ISIR to confirm registration status since the FAFSA has removed it (if on file).

- ***Child Support Arrearages*** alert box moved under additional information section.

- ***Alert and stop boxes*** have been incorporated into the body of the guidelines if they have been repeated year after year.

Any of the following can be used to meet the statutory statement requirement:

- THECB Selective Service Statement of Registration Status (English Statement or Spanish Statement)
- Printout from SSS.gov website
- Institutional Student Information Record (ISIR) if status is available*
- THECB Selective Service Statement of Registration Status embedded in the Texas Application for State Financial Aid (TASFA)

*As of FY 2023-24, registration status is no longer reported on the ISIR. Institutions can use any prior year ISIR that confirms registration to meet the statutory requirement for a student's status.

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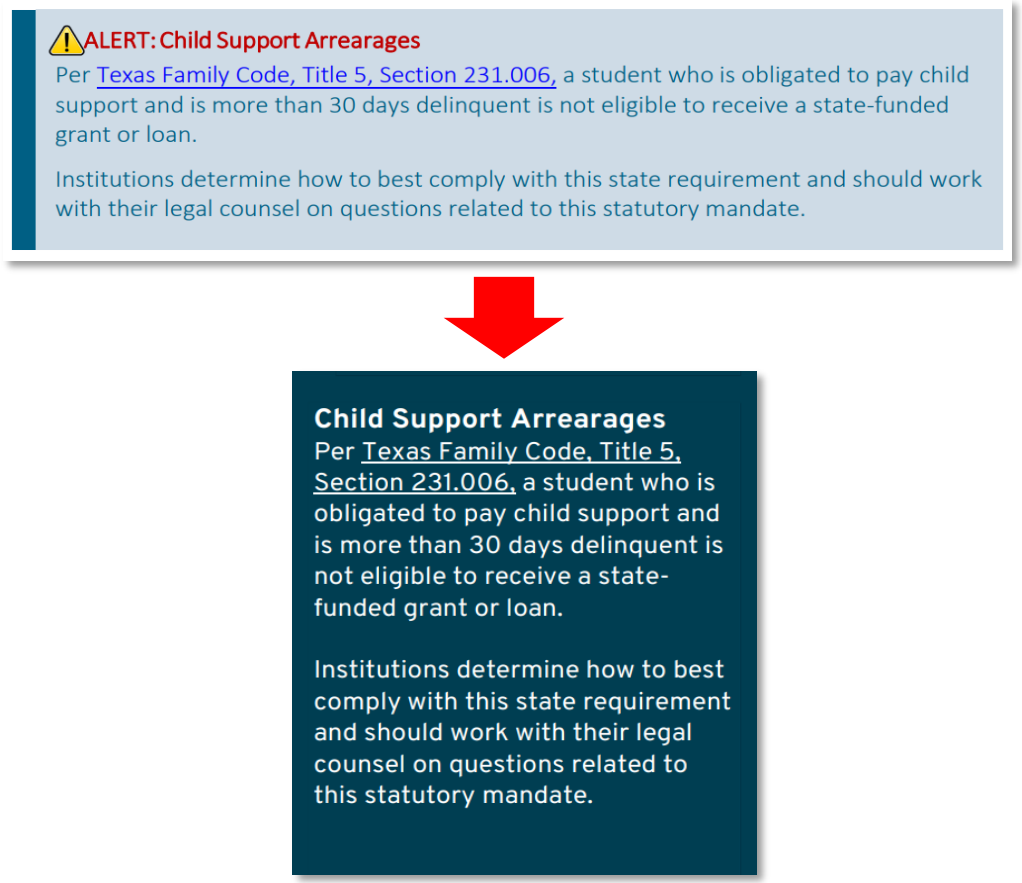

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STOP: Summer Satisfactory Academic Progress Requirements

If the student *receives* state grant funding for the summer term(s), institutions **must** include credits attempted for summer coursework when calculating the satisfactory academic progress.

If a student *does not receive* state grant funding for the summer term(s), a student could take summer coursework to re-establish eligibility if they failed to meet SAP requirements during the 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 their eligibility for the fall term.

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State Grant Updates

State Grant Updates

- **Updated** the priority expected family contribution (EFC) for TEOG and TEXAS Grant to **$6,464.**

- **Updated** program award amounts.

TEXAS Grant

2023-24 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	$5,387	$16,161	$2,500	$7,500

TEOG

2023-24 Award Maximums Students may be issued a total of three awards (fall, spring, and summer) in an academic year.		
Institution Type	Year Max	Semester Max (fall, spring & summer)
Public State Colleges	$5,055	$1,685
Public Technical Institutes	$11,820	$3,940
Public Community Colleges	$5,358	$1,786

TEG

2023-24 Award Maximums Total awards for fall, spring, and summer terms cannot exceed the annual maximum.		
Institution Type	Award Max Per Year	Exceptional Need Amount Per Year
Private/Independent Institutions	$3,873	$5,810

TEOG: Statutory Changes

Memo was sent August 3, 2023 to provide clarity on when TEOG statutory changes take place:

Updated **ALERT: Statutory TEOG Changes**

House Bill (HB) 8, Section 16, was passed during the 88th legislative session which amended TEC, Section 56.407(g). The bill ***removed*** existing text that restricts an institution from using Pell grant funds, to cover any difference in the amount of TEOG and the actual amount of tuition and required fees being charged at the institution. While the amendment is effective as of Sept. 1, 2023, the change in law applies beginning with TEOG awards for the **fall 2024 semester**.

TEG: Update to Exceptional Need

Beginning 2023-24, exceptional need will apply to undergraduate students that have an EFC less than or equal to 50% of the federal Pell Grant eligibility cap that aligns with the year the institution is packaging (i.e., institutions will use 50% of the 2023-24 Pell grant cap to determine which students can receive a TEG award in 2023-24).

Updated **ALERT: Update to Exceptional Need (TAC, Section 22.24(b))**

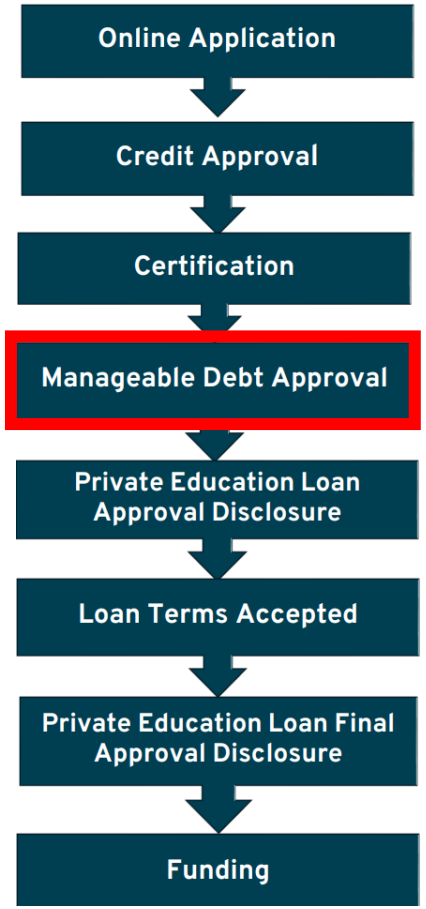
The following rule change was proposed after consensus during negotiated rulemaking activities in November 2022 and approval by the Board in April 2023.

> TAC, Section 22.24(b): The term "exceptional need" was changed to provide institutions with greater flexibility in supporting economically disadvantaged students through funds from the TEG program. The **previous** rule for "exceptional need" was for an undergraduate student that had an expected family contribution (EFC) less than or equal to $1,000.

State Loan Updates

CAL Update: Manageable Debt Calculation

Beginning with applications received by **Sept. 1, 2023**, the THECB will calculate the final loan amount based on a student's “manageable debt” for the borrower’s program of study (see amounts). Depending on the calculation, the loan could be reduced or canceled by the THECB after the loan has been certified by an institution (see TAC, Section 22.49(c)).

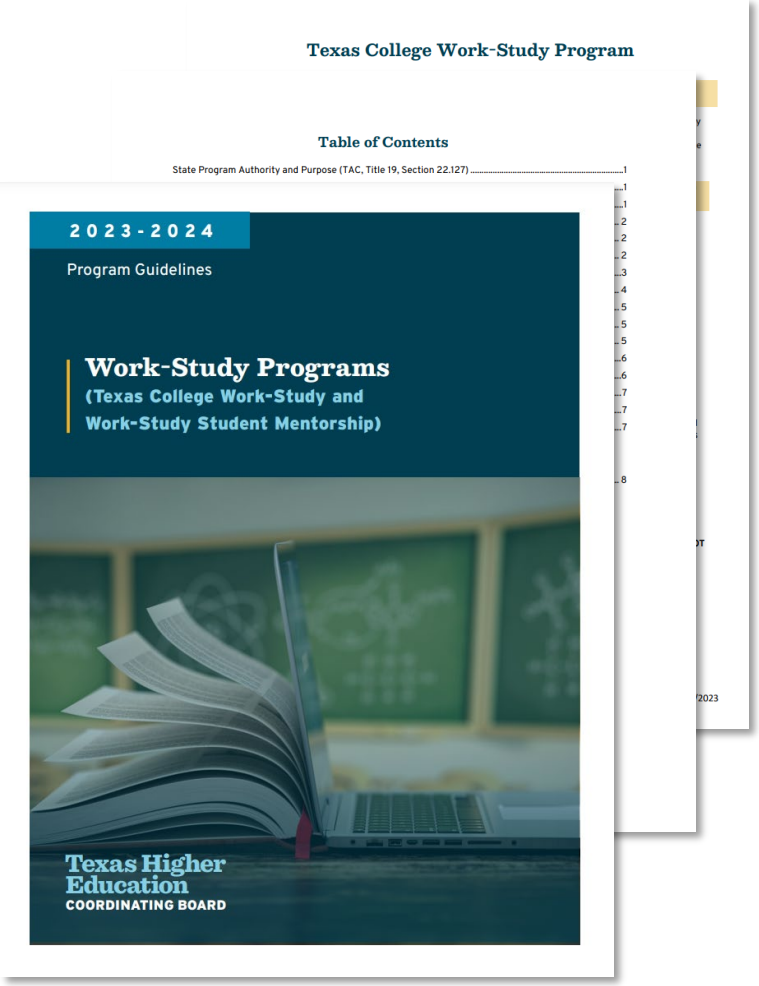


State Work-Study Updates

Work-Study Updates

- The former Texas College Work-Study Program and the Work-Study Student Mentorship Program guidelines were combined to align with the Texas Education Code and Texas Administrative Code.

- The overarching program for Texas College Work-Study will simply be referred to as the “Program” or “TCWS” and the Work-Study Student Mentorship Program will be referred to as “Mentorship Program”.



Work-Study Allocations

- Individual allocations will be combined into one single allocation and will be calculated for both years of the biennium.
- Institutions can request funds throughout the academic year, the THECB will no longer disburse a lumpsum of the institution's allocation.
- Aspects of the allocation rule regarding reallocations and summer awards were removed, as they are no longer relevant. However, institutions may use funds for summer.
- All funds must be requested by August 1 and expended by August 31 of the current fiscal year.

Opting into Work Study Programs

Institutions choosing to participate in both TCWS, and the Mentorship Program must disburse a minimum of 25% of their allocation to students participating in the Mentorship Program.

Institutions indicating participation in only one work-study program may only use allocated funding for the program in which they indicated intention to participate.

Mentorship Reporting Updates

- Monthly Financial Report is no longer required.
- Reconciliation between TCWS and the Mentorship Program will be done solely through the Financial Aid Database Report.
- Annual Program Summary Report is required.
- Title III Exemption Form is still required.

State Work-Study Programs

NEW! The Texas College Work-Study (TCWS) Program and the Work-Study Student Mentorship Program (WSMP) guidelines and resources have been combined to better align with Texas Administrative Code. The Work-Study Student Mentorship Program is referred to as Mentorship Program.

The Texas College Work-Study Program is authorized by TEC, Title 3, Chapter 56, Subchapter E, Section 56.073 and the Work-Study Student Mentorship Program is authorized by TEC, Title 3, Chapter 56, Subchapter E, Section 56.079. Rules for administering these programs can be found in TAC, Title 19, Chapter 22, Subchapter G.

The purpose of the Texas College Work-Study Program is to provide eligible students with jobs, funded in part by the State of Texas, to enable those students to attend eligible institutions of higher education in Texas and, through a mentorship program, to mentor, tutor, or advise college students at participating eligible institutions of higher education or high school students within local school districts and non-profit organizations.

- State Work-Study Programs FY 2024 Guidelines[PDF]
- State Work-Study Programs FY 2024 Final Allocations [PDF]
- State Work-Study Programs FY 2025 Final Allocations [PDF]

TCWS Resource Archive

- FY 2023 TCWS Guidelines [PDF]
- FY 2023 TCWS Revised Final Allocations [PDF]

WSMP Resource Archive

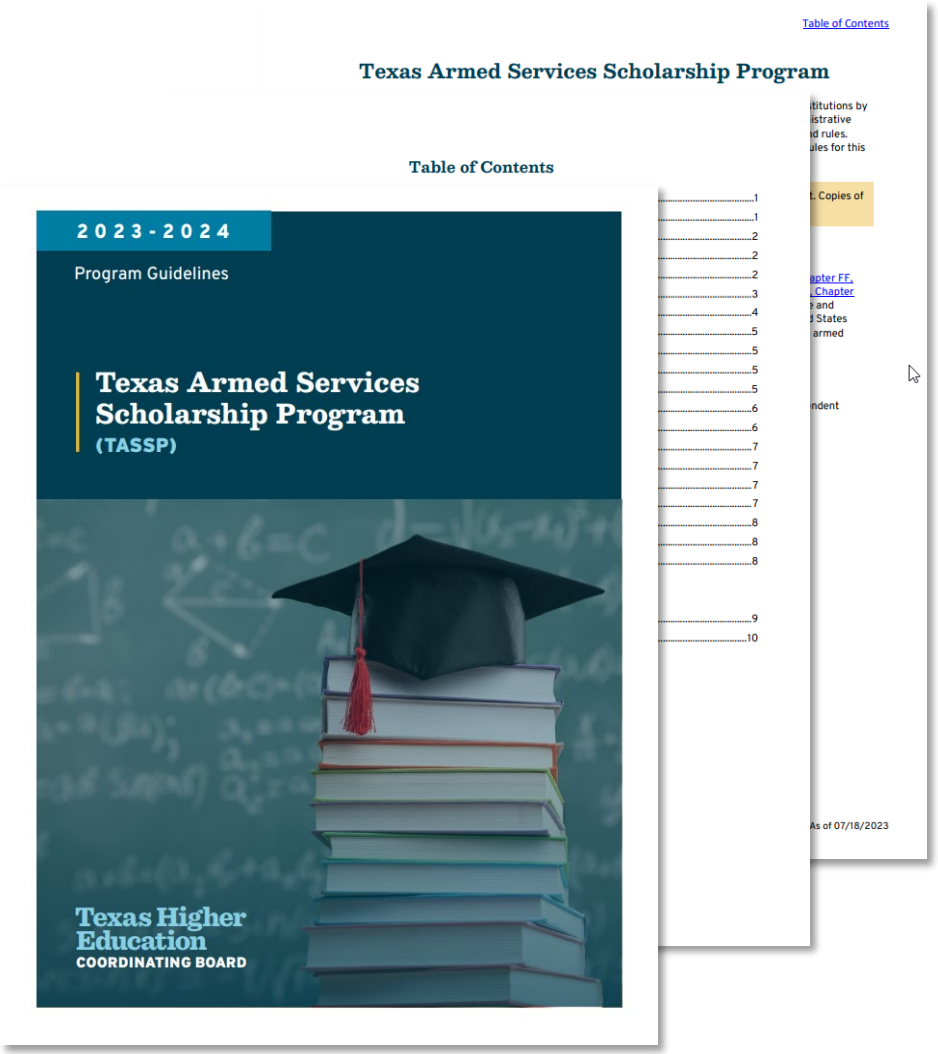
- FY 2023 WSMP Guidelines [PDF]
- FY 2023 WSMP Final Allocations [PDF]
- WSMP Institutional Online Report Portal Guide [PDF]
  - Financial Report Template [XLSX]
  - Annual Program Summary Report Template [XLSX]
  - Sample MOU [PDF]

Texas Armed Services Scholarship (TASSP) Updates

TASSP Updates

- Annual maximum award amount **increased** from $10,000 to $15,000.

- **Added** a section explaining the Alternate Nomination process for a Texas Legislator.



Bilingual Education Updates

Bilingual Education Updates

- Eligible institutions were **updated** to reflect the five new institutions added to the program.
- The definition of financial need was **updated** to align with rules in the TAC, Section 22.1(14).
- The "State Board for Educator Certification Bilingual Target Language Proficiency Test" was **removed** as an eligibility requirement to align with rider updates.

Educational Aide Exemption (EAE) Updates

EAE Updates

- Educational Aide Exemption Application participating institutions list was **updated**.

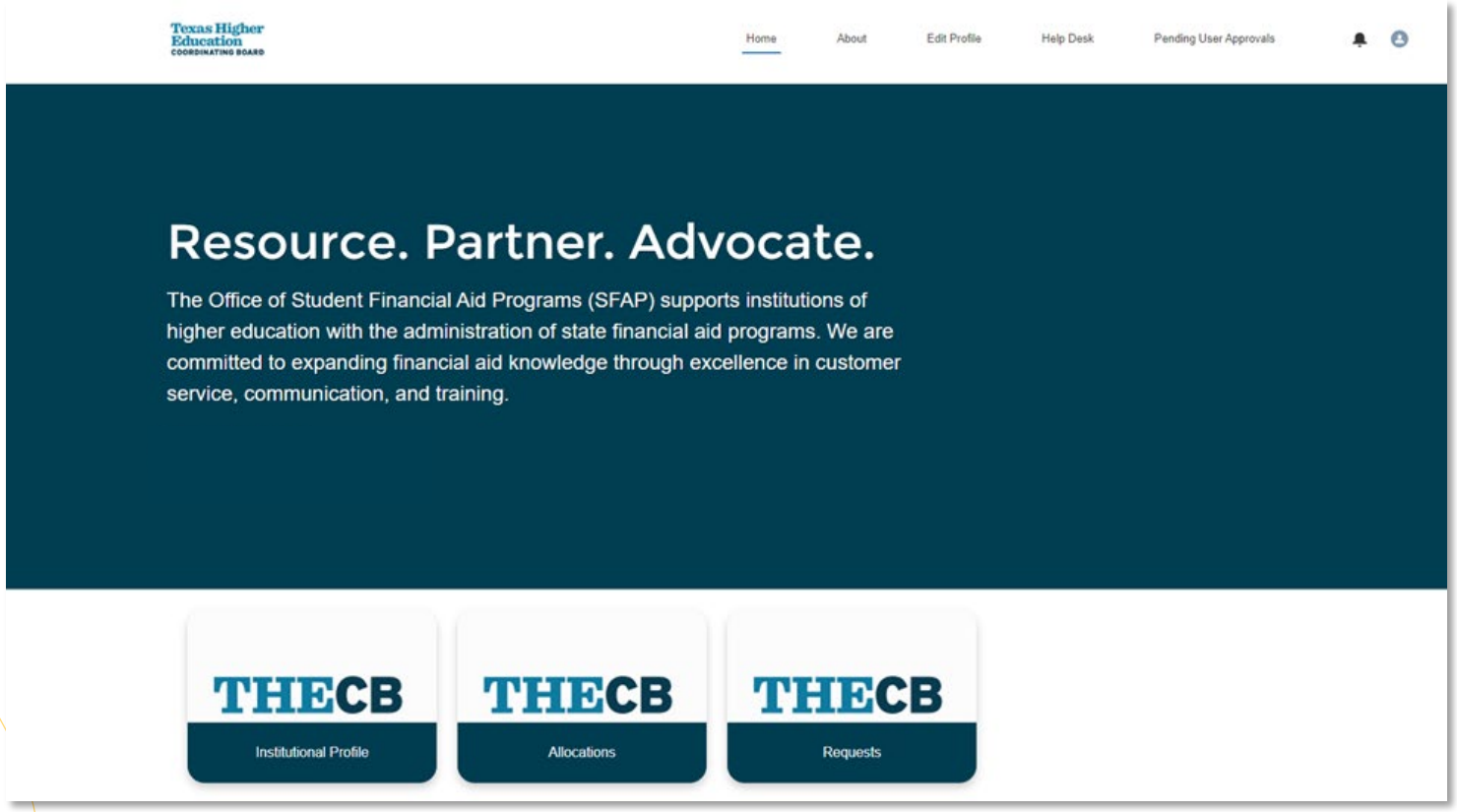
- The critical shortage list was **updated** to reflect Texas Education Agency's 2023-24 critical shortage areas.

Introduction to the Grant and Aid Processing Platform

(GAPP)

What is the Grant and Aid Processing Platform?

The new Grant and Aid Processing Platform (GAPP) portal is a modernized platform that will integrate a majority of our financial aid programs into one central location.



GAPP will go live with the following programs:

- TEXAS Grant
- TEOG
- TEG
- Educational Aid Exemption
- Bilingual Education
- State Work Study Programs

User Roles

- Primary Point of Contact (PPC)
- **Secondary Point of Contact (SPC)**
- Reporting Official (RO)
- Business Office Contact (BOC)
- **Institutional Aid Administrator (IAA)**

- ✓ **Is granted access by THECB**
- ✓ **Grant/Remove access to users**
- ✓ **Can submit the yearly intent to participate**
- ✓ **Can submit and approve the following:**
  - Transfer Requests
  - Return of Funds
  - Update Student Count
- ✓ **Submit/Review help desk tickets**

User Roles

- Primary Point of Contact (PPC)
- **Secondary Point of Contact (SPC)**
- Reporting Official (RO)
- Business Office Contact (BOC)
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- ✓ **Can only be granted access by PPC**
- ✓ **Grant/Remove access to users**
- ✓ **Can submit the yearly intent to participate**
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  - Transfer Requests
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  - Update Student Count
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- Secondary Point of Contact (SPC)
- Reporting Official (RO)
- Business Office Contact (BOC)
- Institutional Aid Administrator (IAA)

✓ **Access is granted by PPC/SPC**

✓ **Can submit the following:**
- Transfer Requests
- Return of Funds
- Update Student Count

✓ **Can access the Institutional Profile, Allocations, and Request tiles in the portal.**

✓ **Submit/Review help desk tickets**

User Roles

- Primary Point of Contact (PPC)
- **Secondary Point of Contact (SPC)**
- Reporting Official (RO)
- Business Office Contact (BOC)
- **Institutional Aid Administrator (IAA)**

- ✓ Access is granted by PPC/SPC
- ✓ Handles disbursement activities
- ✓ Can access the Institutional Profile, Allocations, and Request tiles in the portal
- ✓ Submit/Review help desk tickets

User Roles

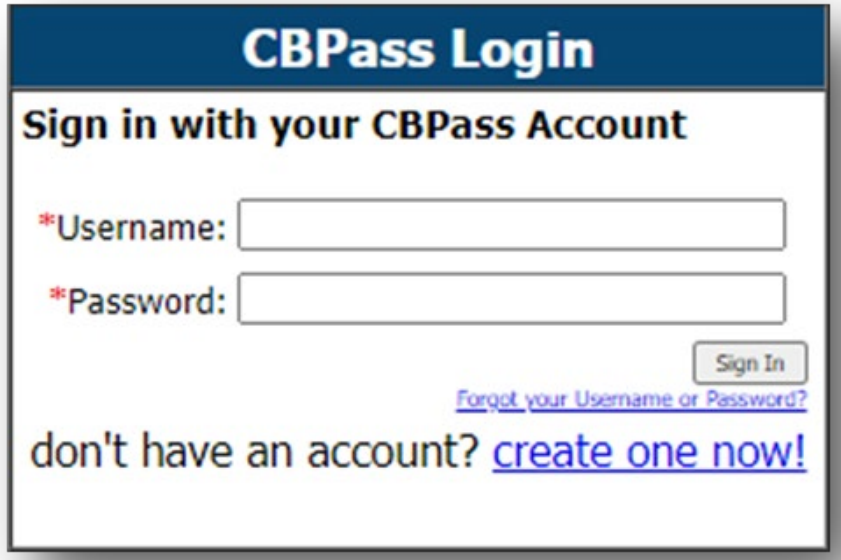
- Primary Point of Contact (PPC)
- **Secondary Point of Contact (SPC)**
- Reporting Official (RO)
- Business Office Contact (BOC)
- **Institutional Aid Administrator (IAA)**

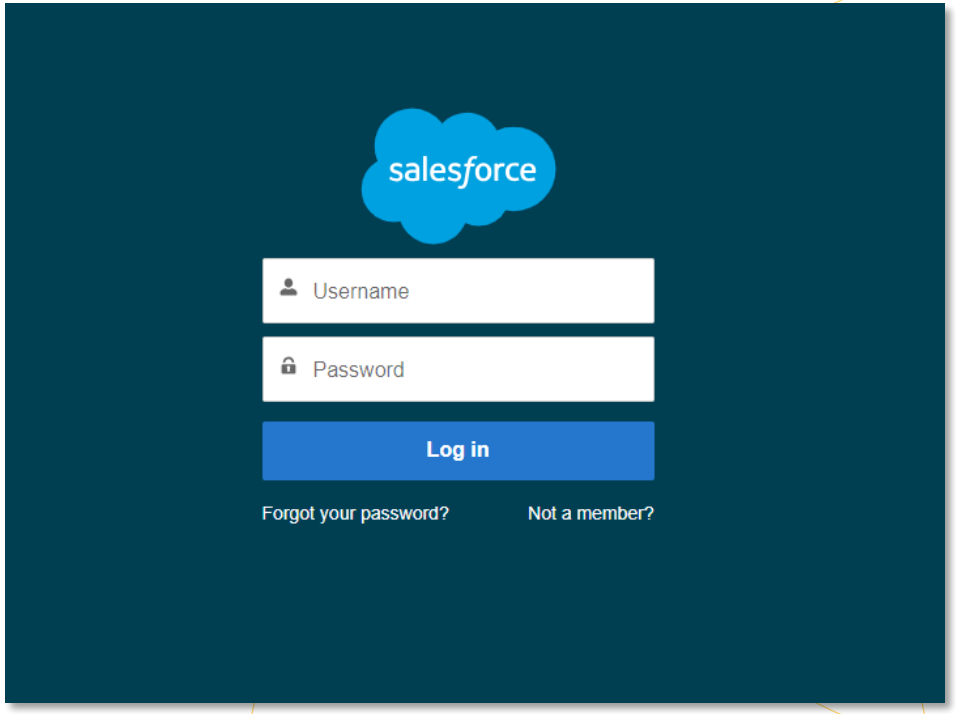
- ✓ Access is granted by PPC/SPC
- ✓ Can view the Institutional Profile and Allocations tiles in portal
- ✓ Submit/Review help desk tickets

Logging In

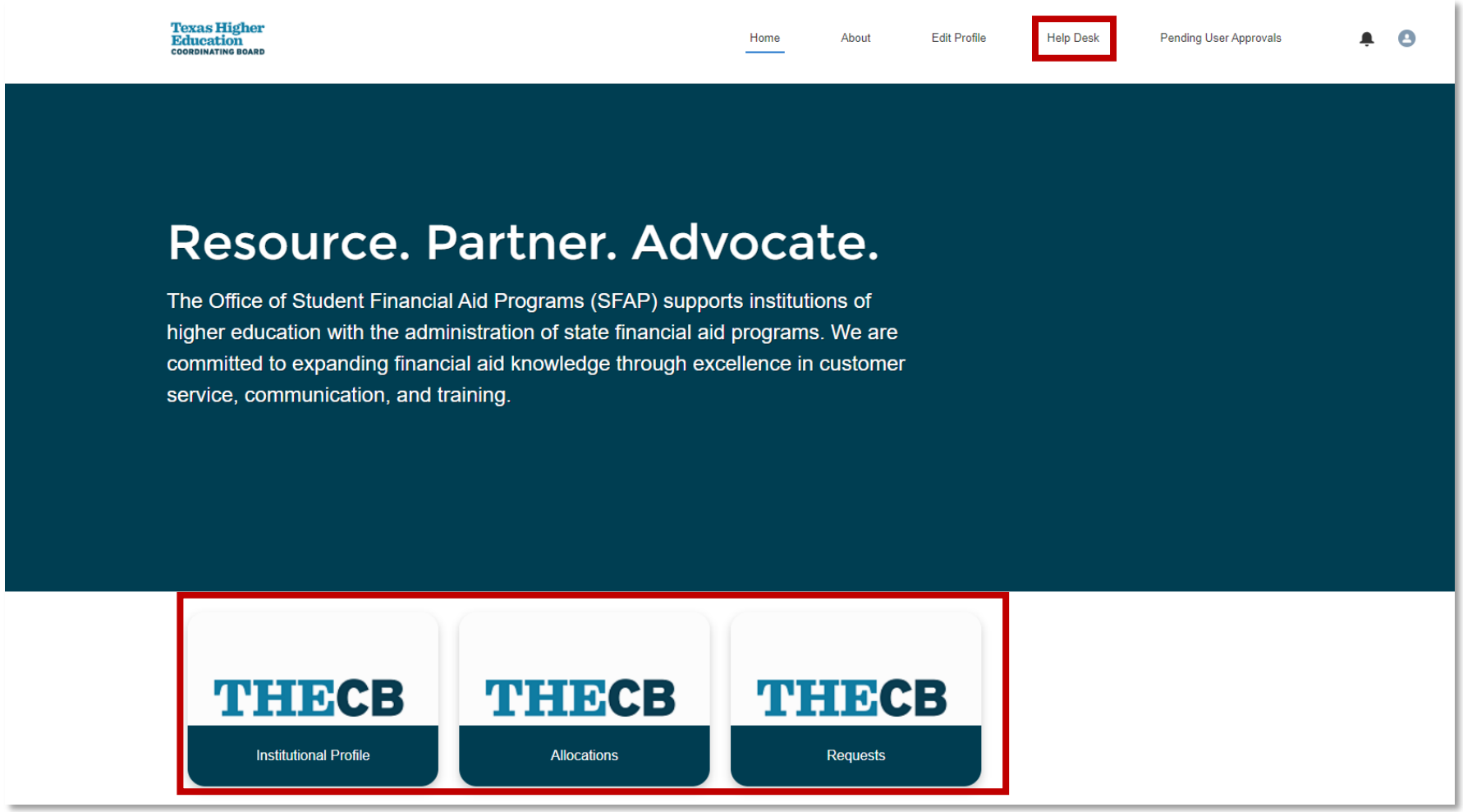
Institutions have been accustomed to logging into CBPass to access GPP.

Now institutions will log into the GAPP portal.





GAPP Landing Page



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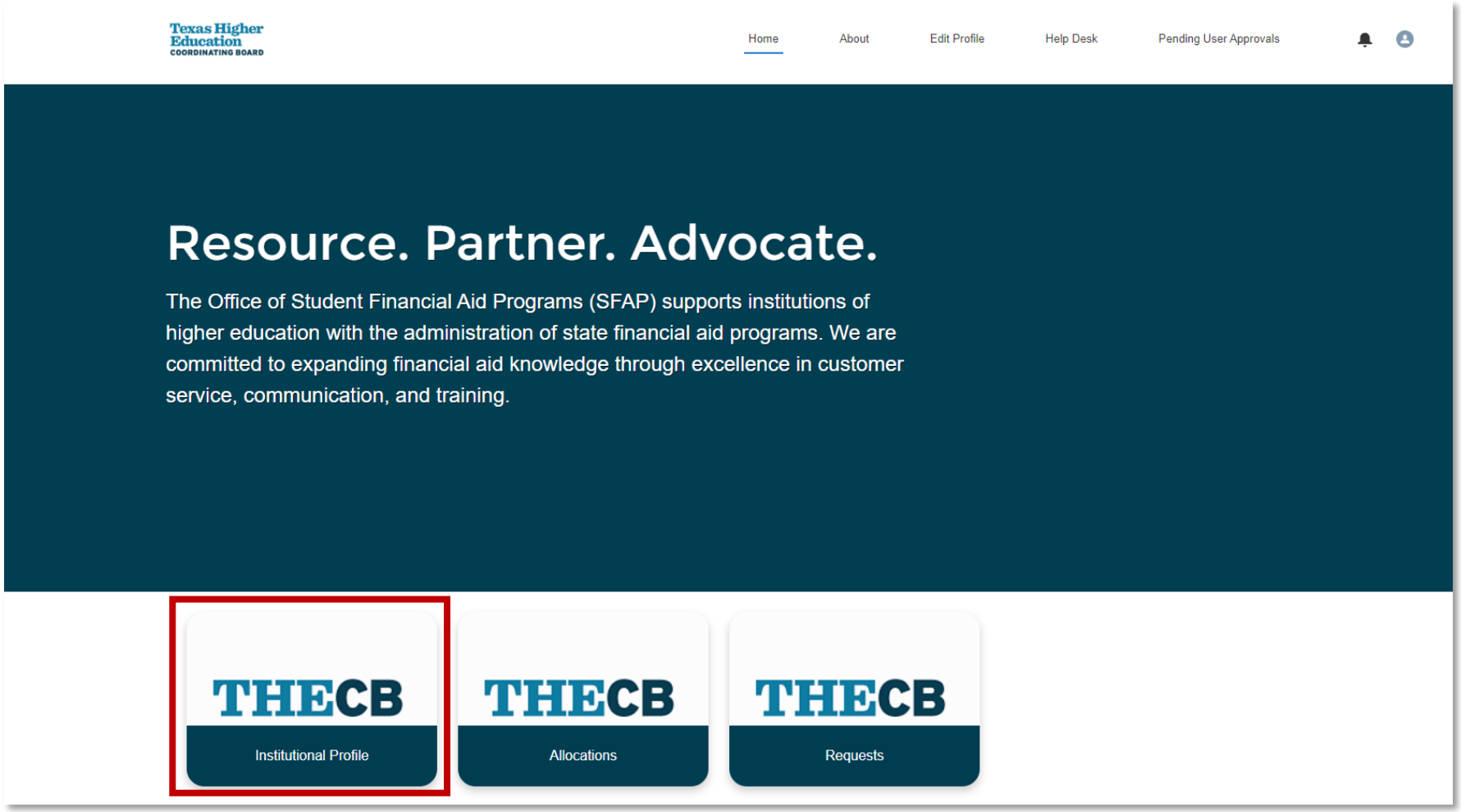
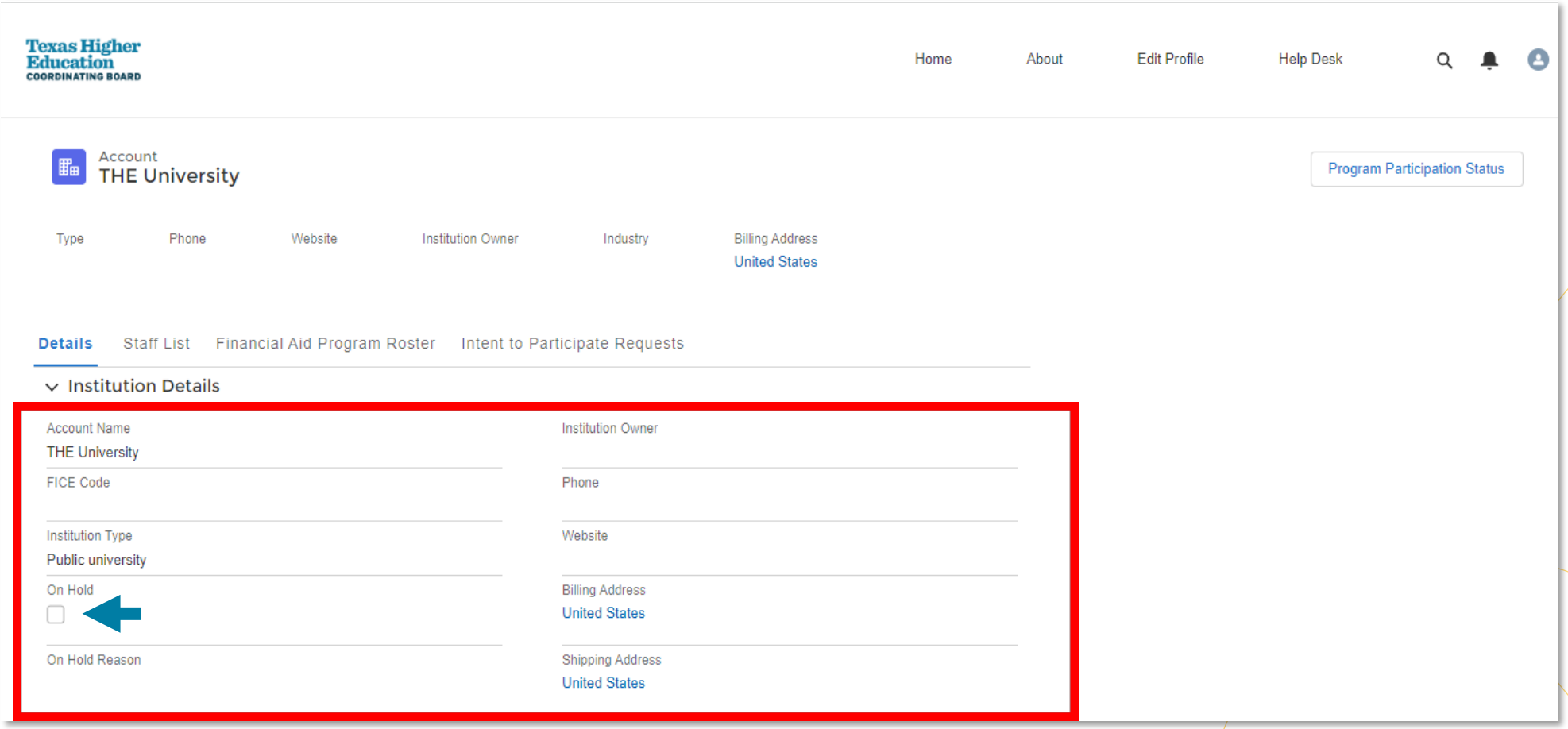
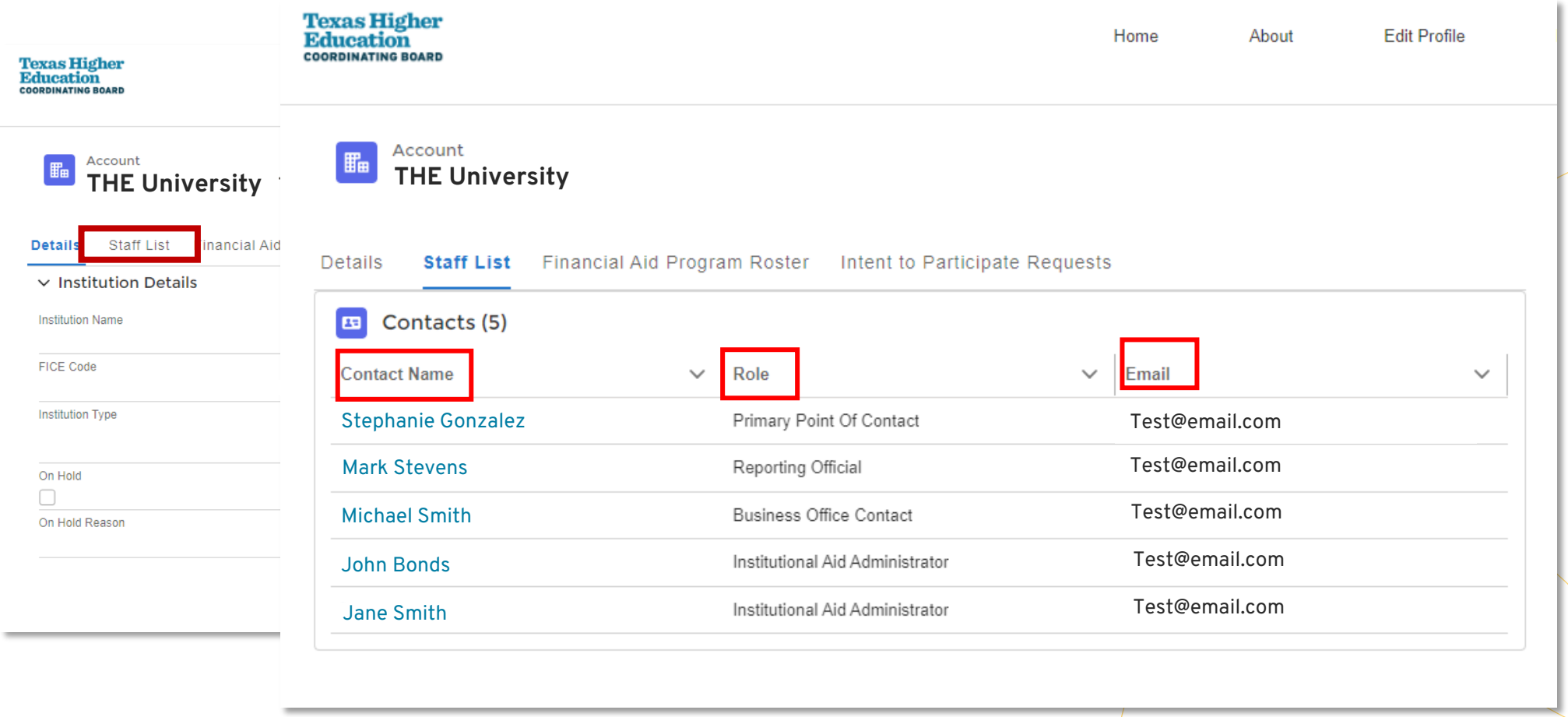


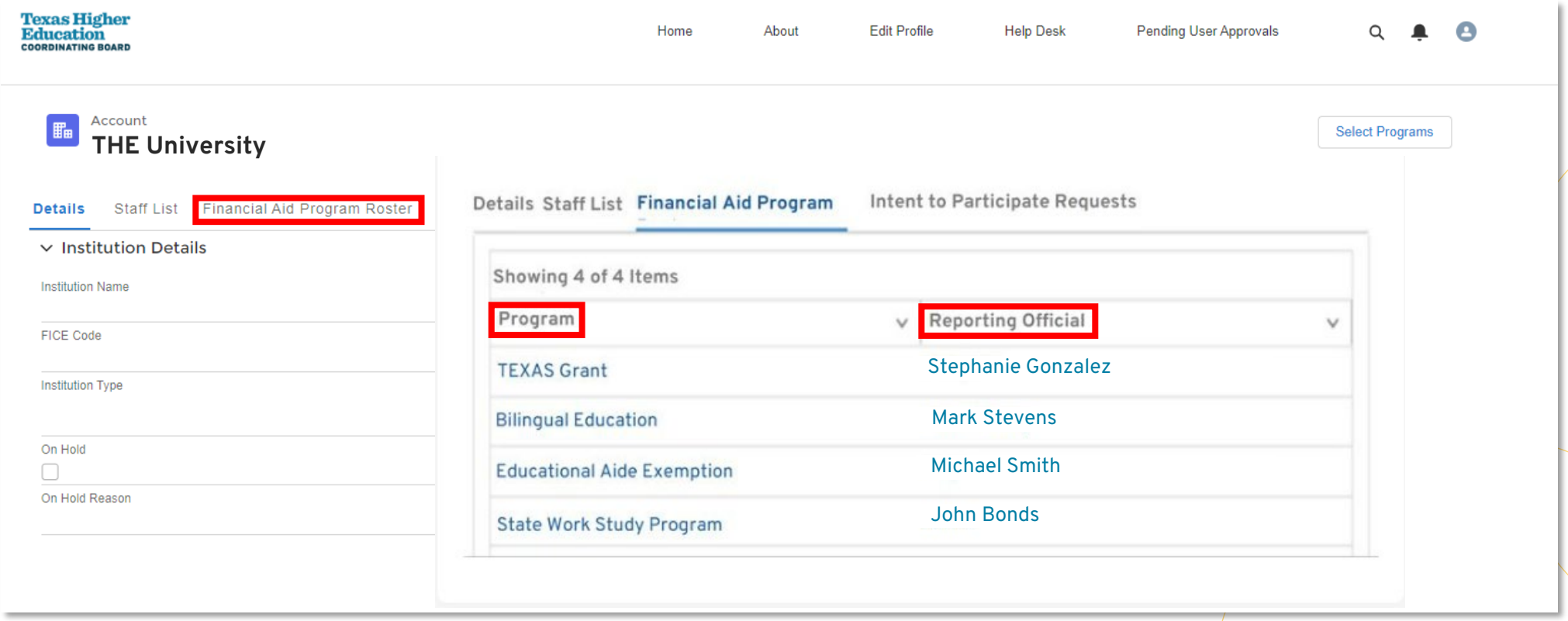
Institutional Profile: Details Tab



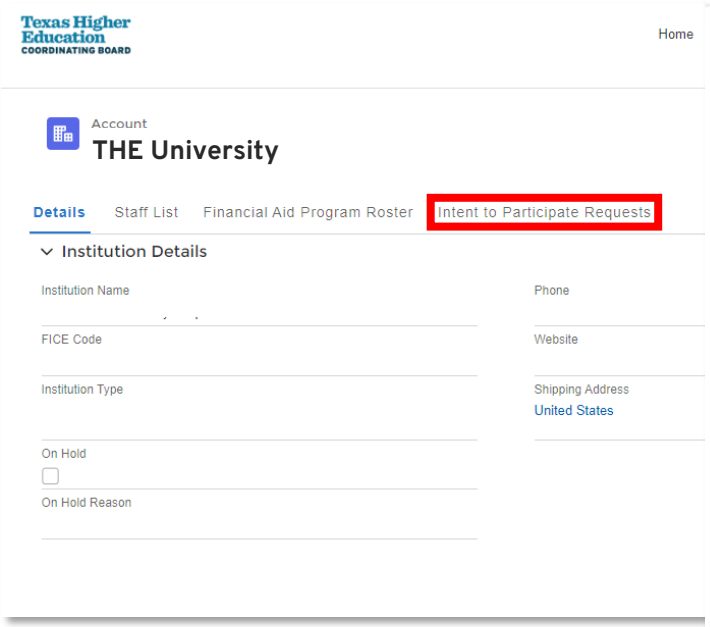
Institutional Profile: Staff List

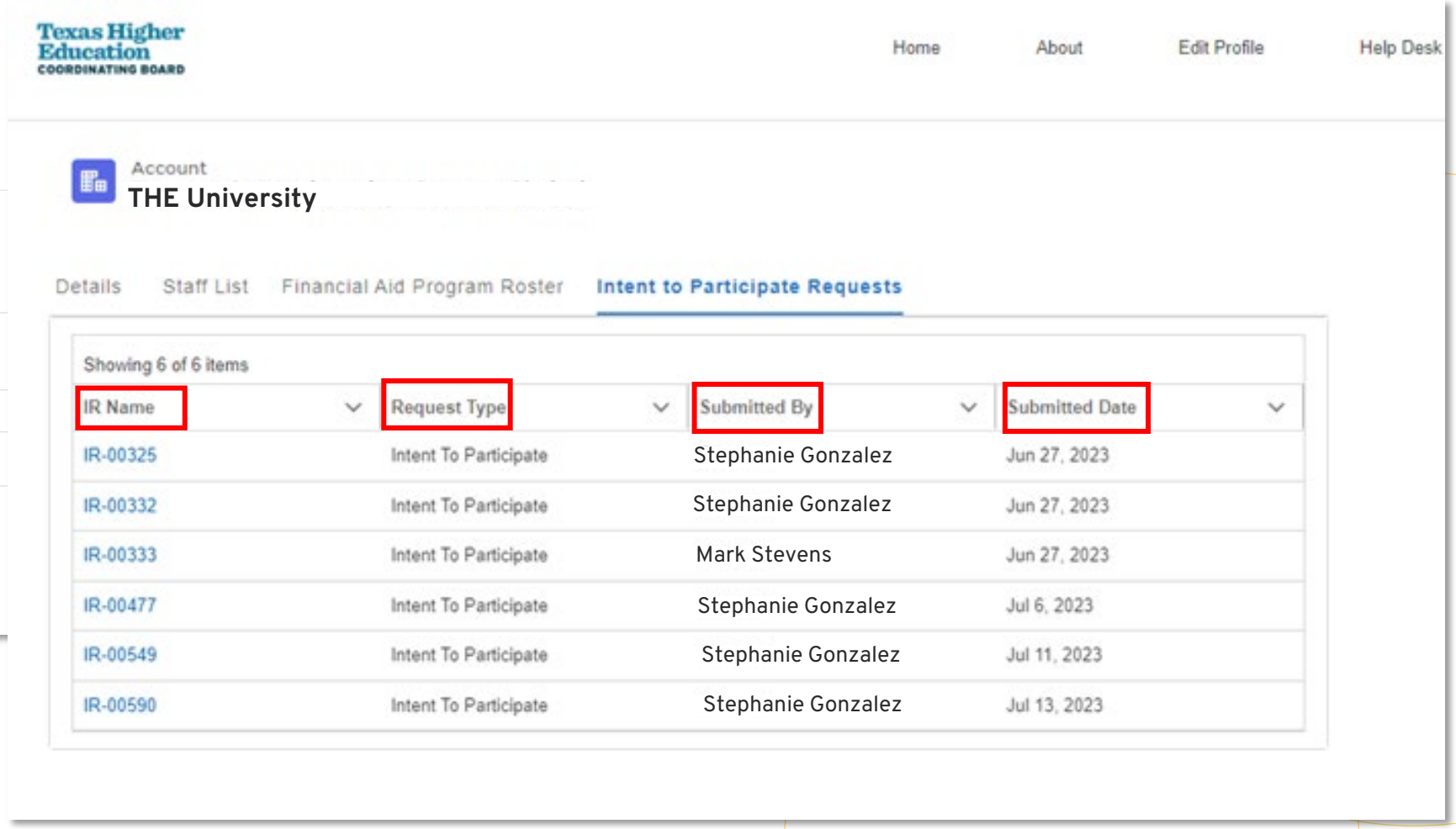


Institutional Profile: Program Roster

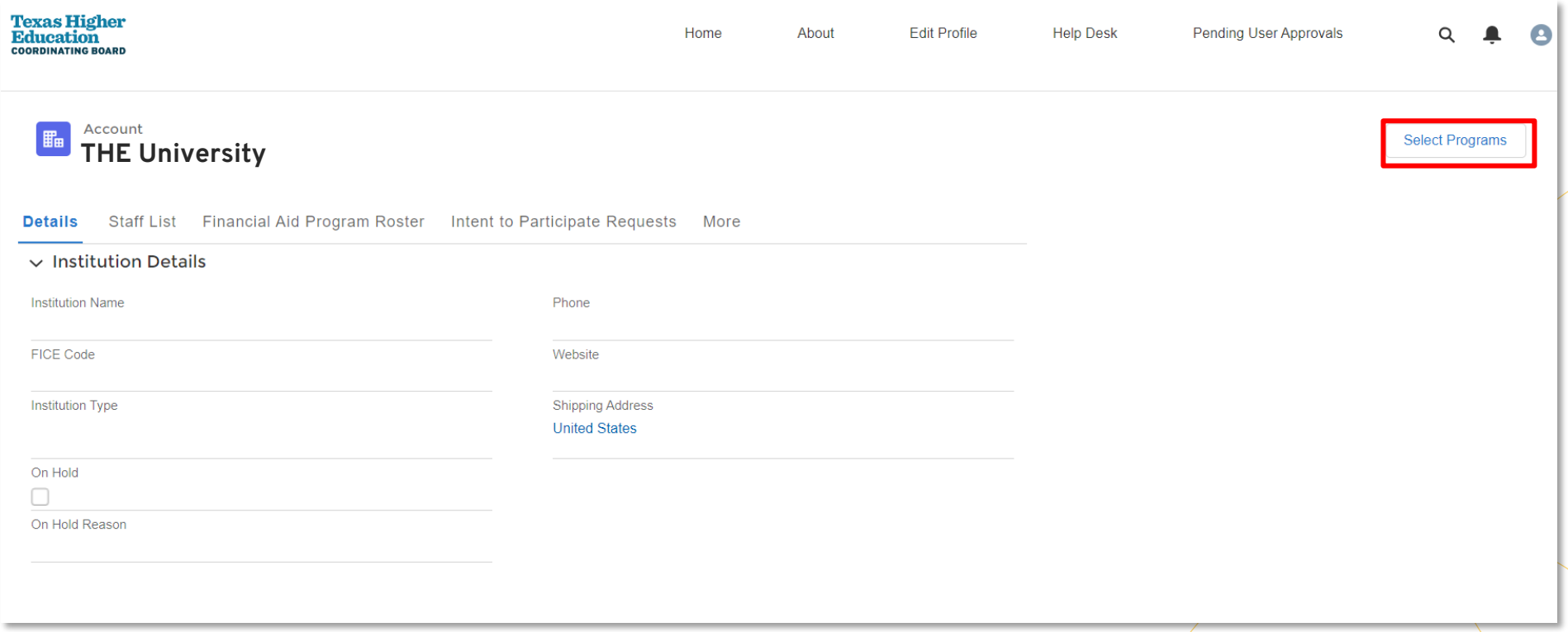


Institutional Profile: Opt-in/Out





Intent to Participate



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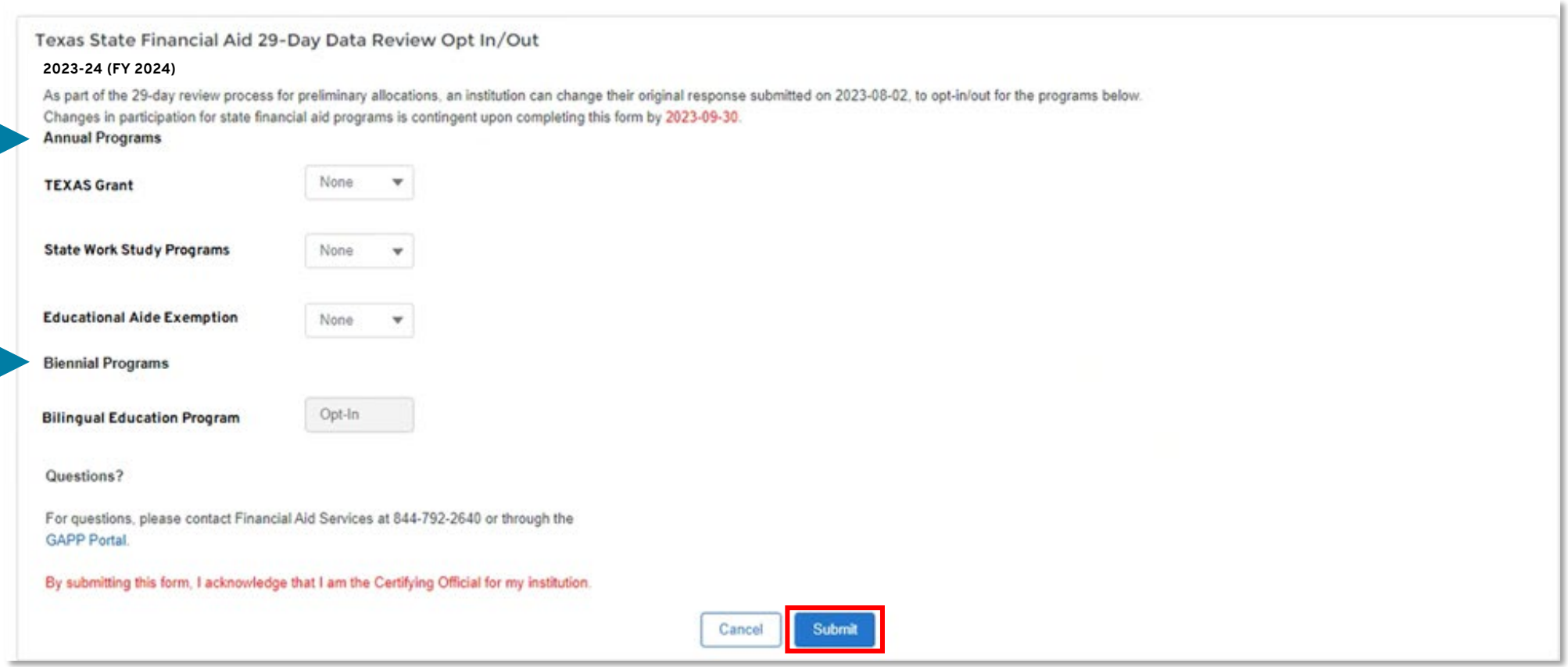


Texas State Financial Aid 29-Day Data Review Opt In/Out

2023-24 (FY 2024)

As part of the 29-day review process for preliminary allocations, an institution can change their original response submitted on 2023-08-02, to opt-in/out for the programs below.
Changes in participation for state financial aid programs is contingent upon completing this form by 2023-09-30.

Annual Programs

TEXAS Grant	None
State Work Study Programs	None
Educational Aide Exemption	None

Biennial Programs

Bilingual Education Program	Opt-In

Questions?

For questions, please contact Financial Aid Services at 844-792-2640 or through the GAPP Portal.

By submitting this form, I acknowledge that I am the Certifying Official for my institution.

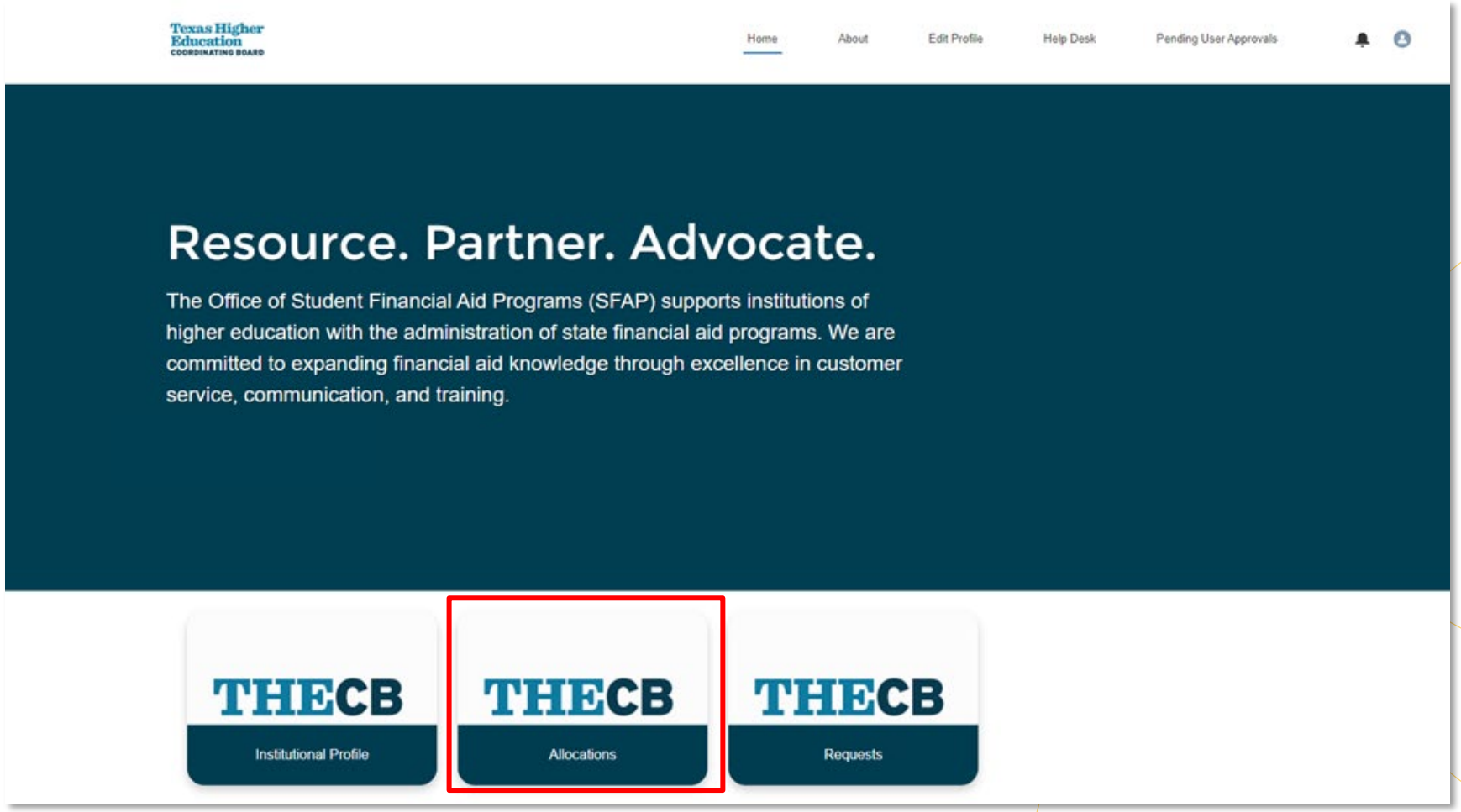
Cancel | Submit

Intent to Participate

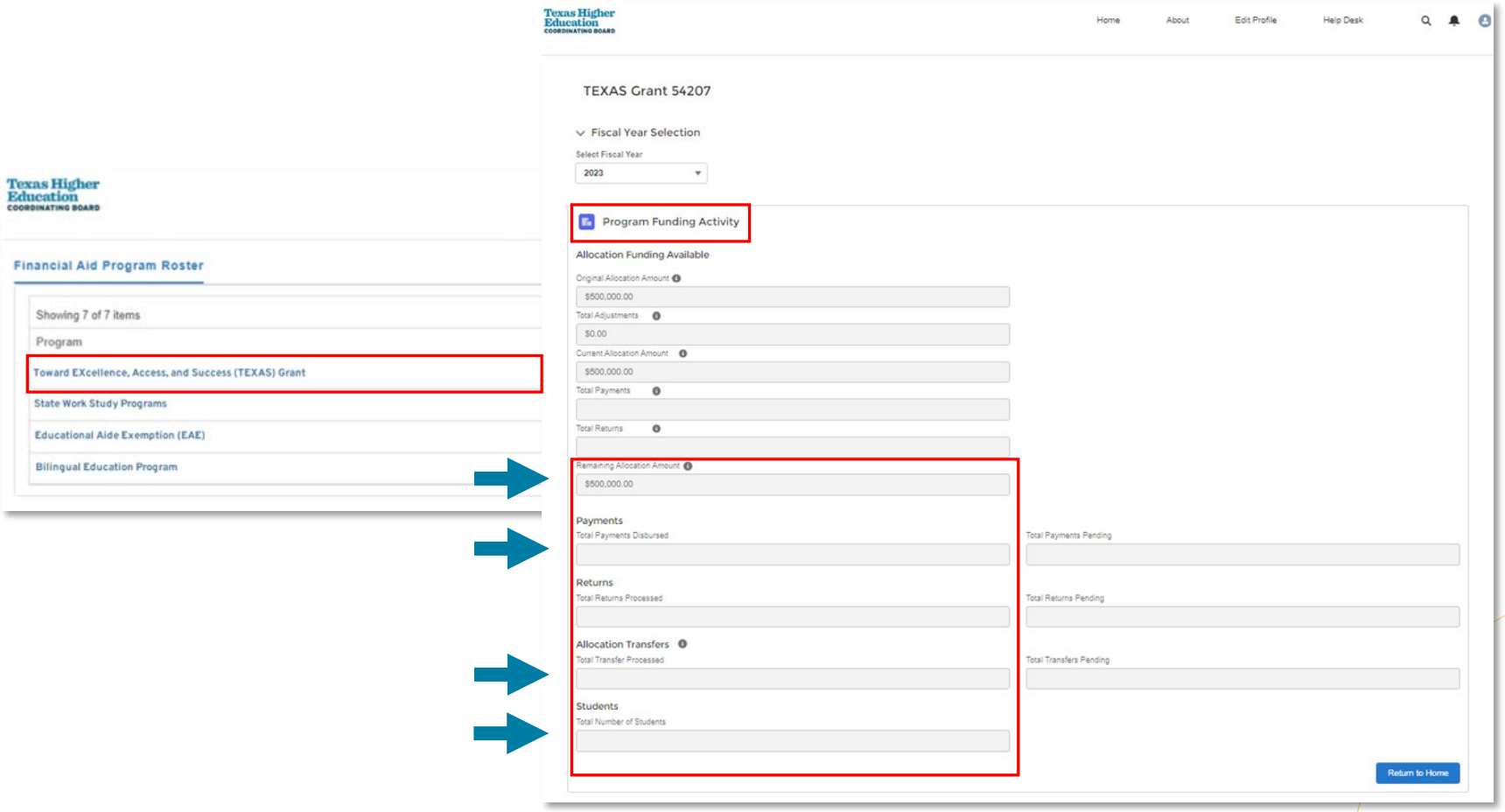
Texas State Financial Aid Opt In/Out 2023-24 (FY 2024)

Institution Type Public University
Institution Name THE University
Institution FICE (6 digits) XXXXXX
Toward EXcellence, Access, and Success Grant Opt-In
State Work Study Programs Opt-In
Name Stephanie Gonzalez
Title Financial Aid Director
Email Address test@email.com
Phone Number 000-000-0000
Date of Submission 07/27/2023

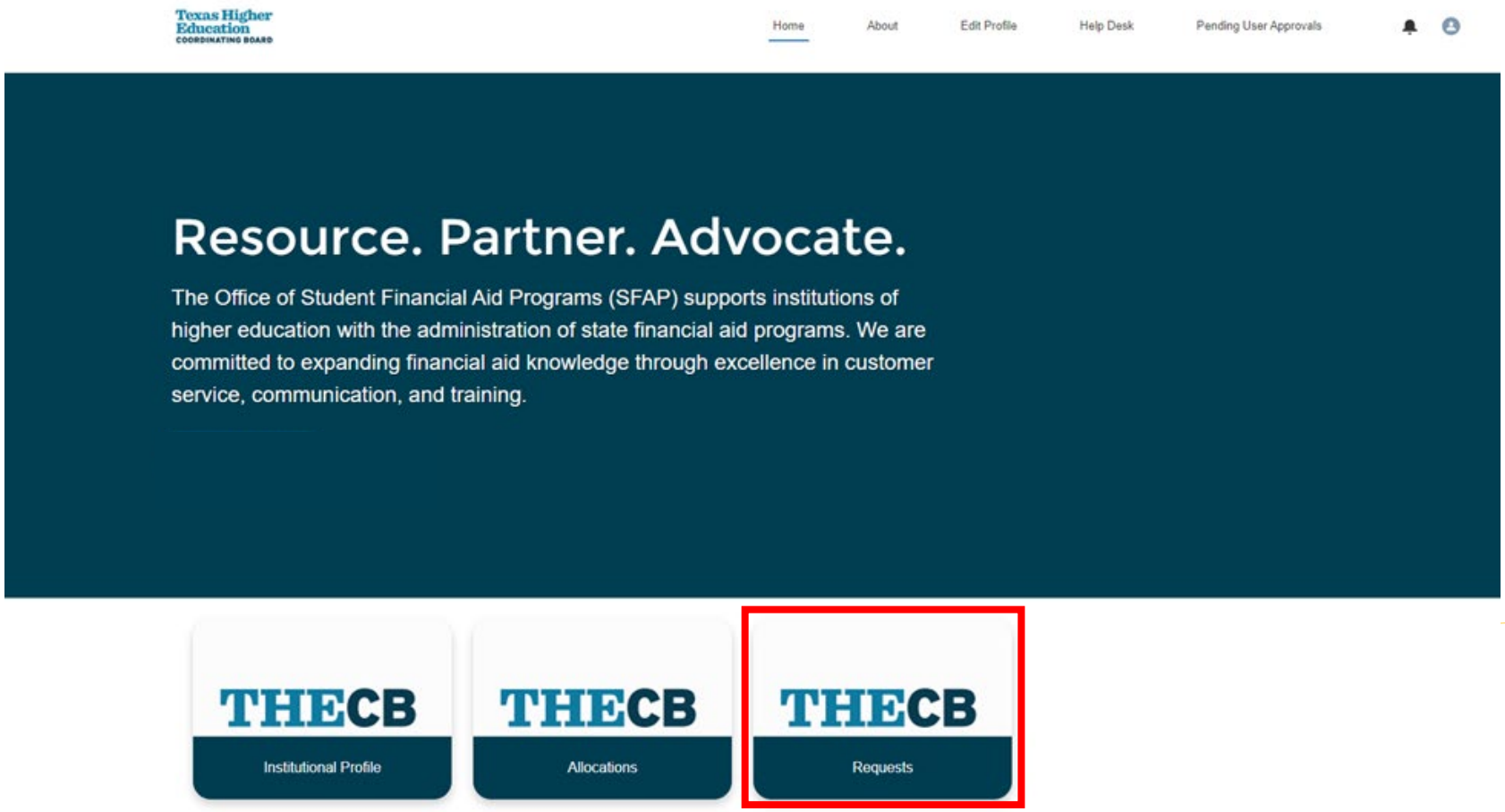
Allocations



Allocations



Requests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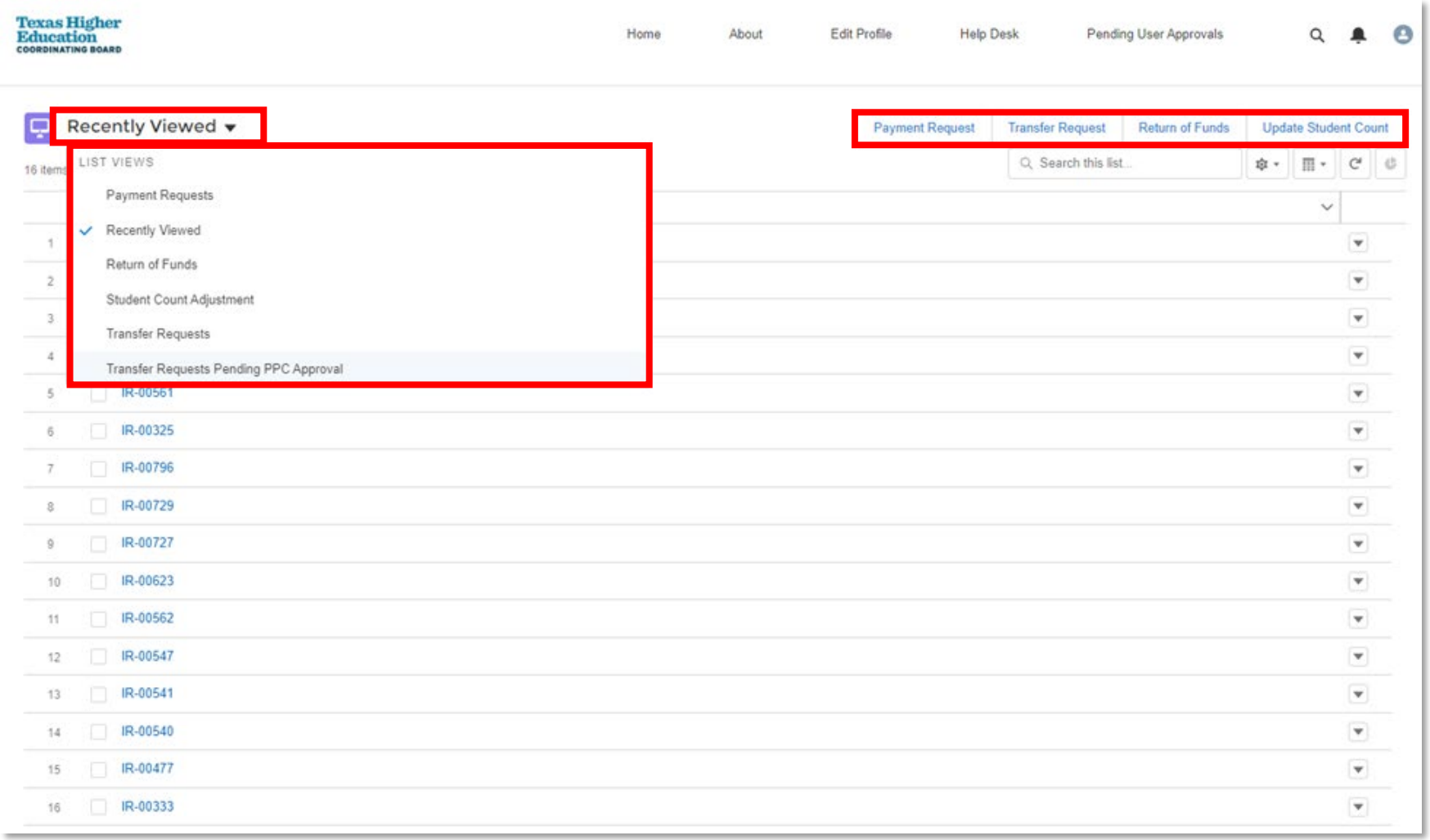
The Office of Student Financial Aid Programs (SFAP) supports institutions of higher education with the administration of state financial aid programs. We are committed to expanding financial aid knowledge through excellence in customer service, communication, and training.
THECB
Institutional Profile
THECB
Allocations
THECB
Requests

Requests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Transfer Request
Return of Funds
Update Student Count
16 items
LIST VIEWS
Search this list...
Payment Requests
Recently Viewed
Return of Funds
Student Count Adjustment
Transfer Requests
Transfer Requests Pending PPC Approval
1 IR-00561
2 IR-00325
3 IR-00796
4 IR-00729
5 IR-00727
6 IR-00623
7 IR-00562
8 IR-00547
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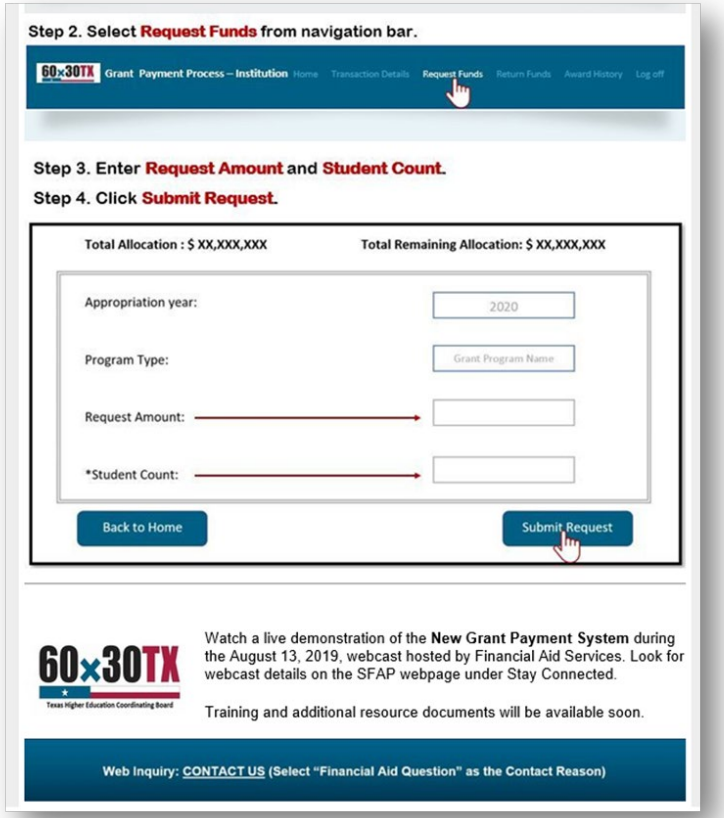
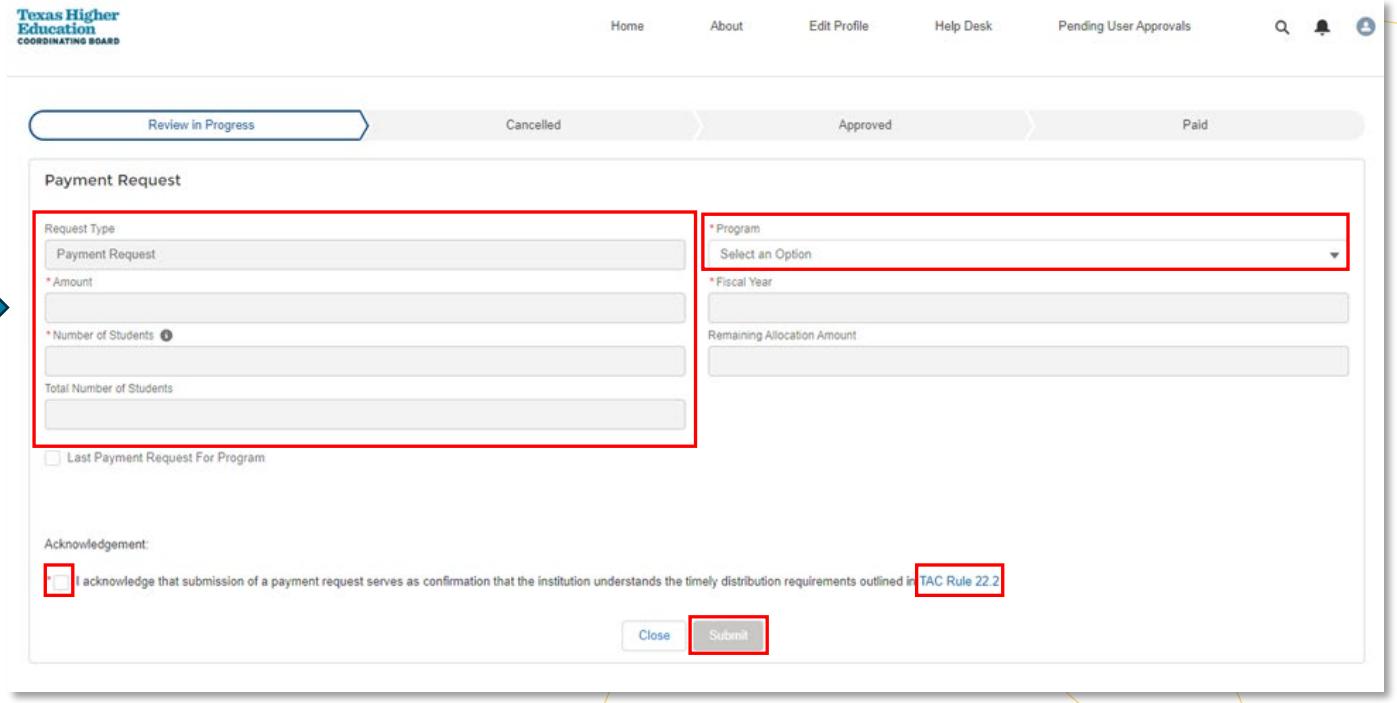
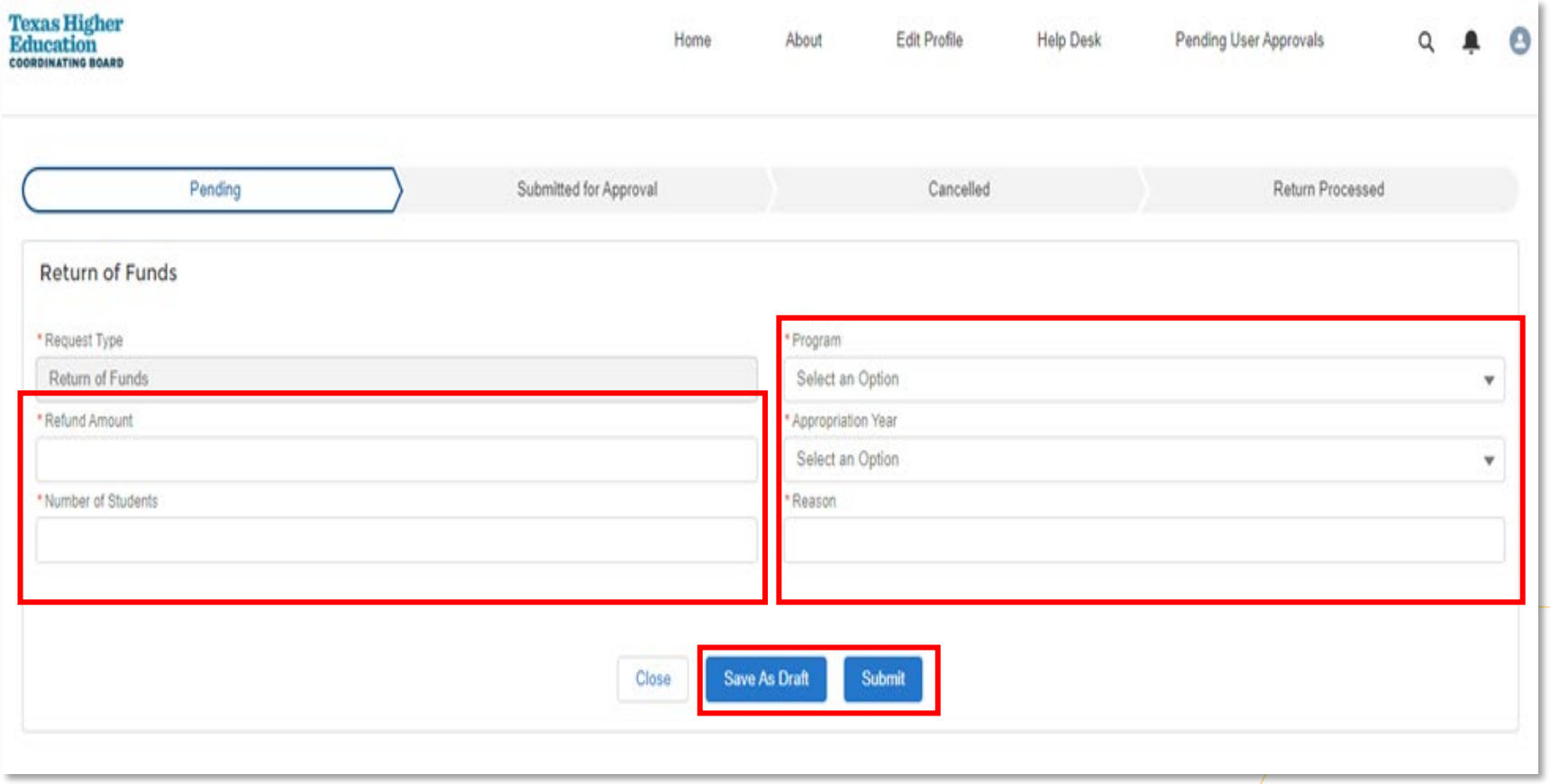
Payment Request



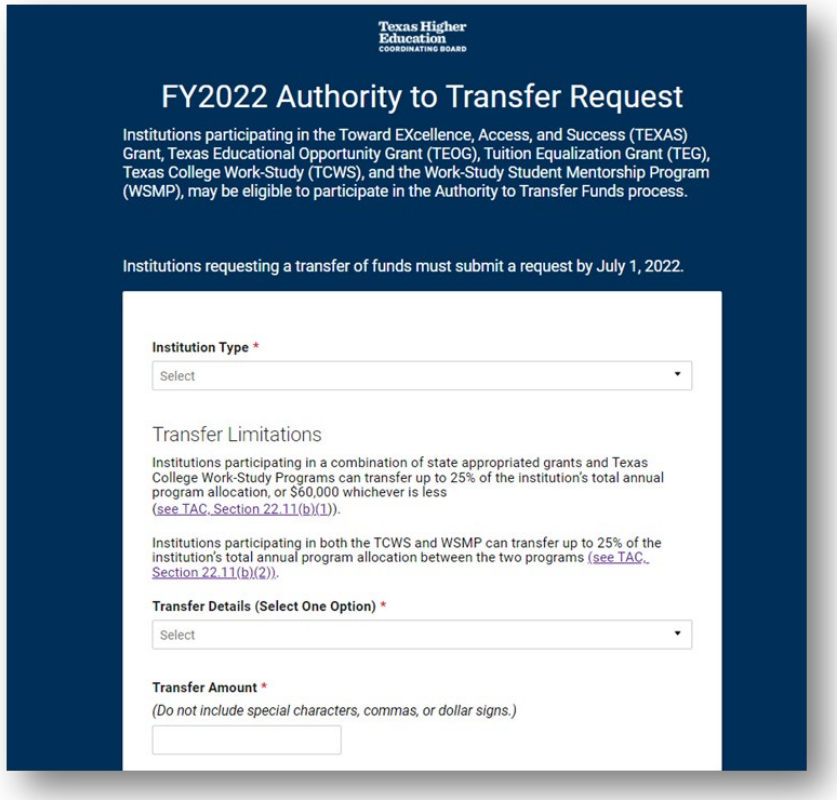


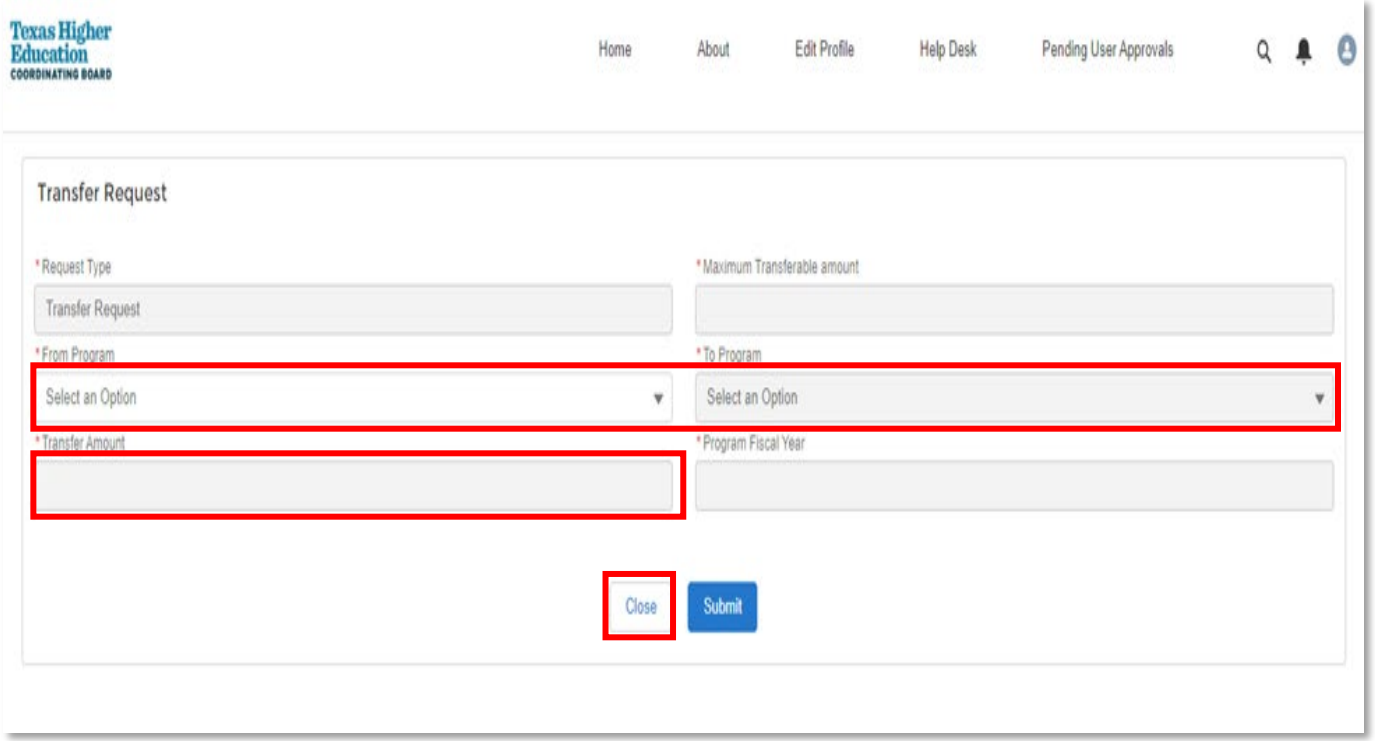
Note: Beginning 2023-24, payment requests must go through GAPP.

Return of Funds Form



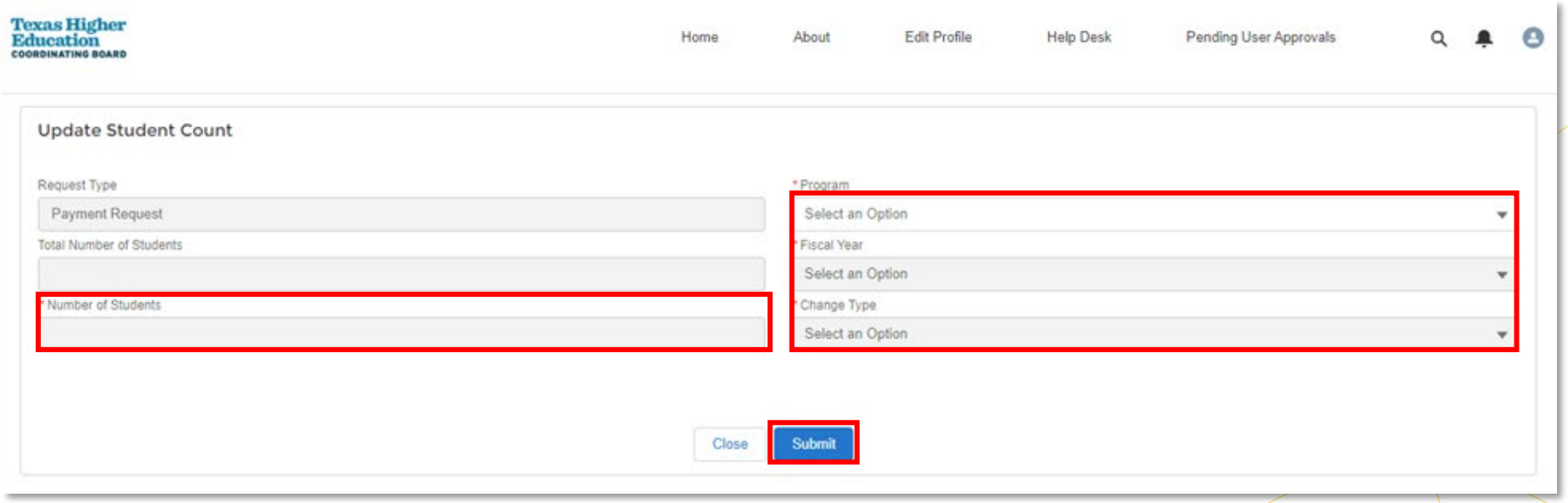
Transfer Request



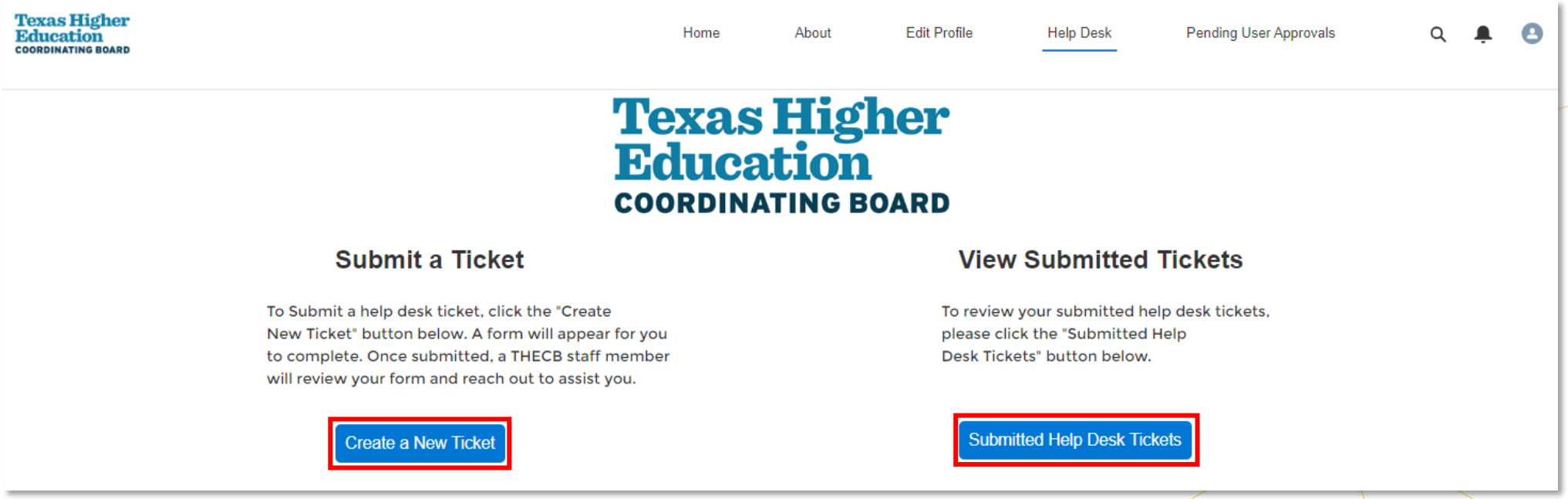


Note: Beginning 2023-24, Authority of Transfer Request must go through GAPP.

Update Student Count



Help Desk


Texas Higher Education COORDINATING BOARD
Home
About
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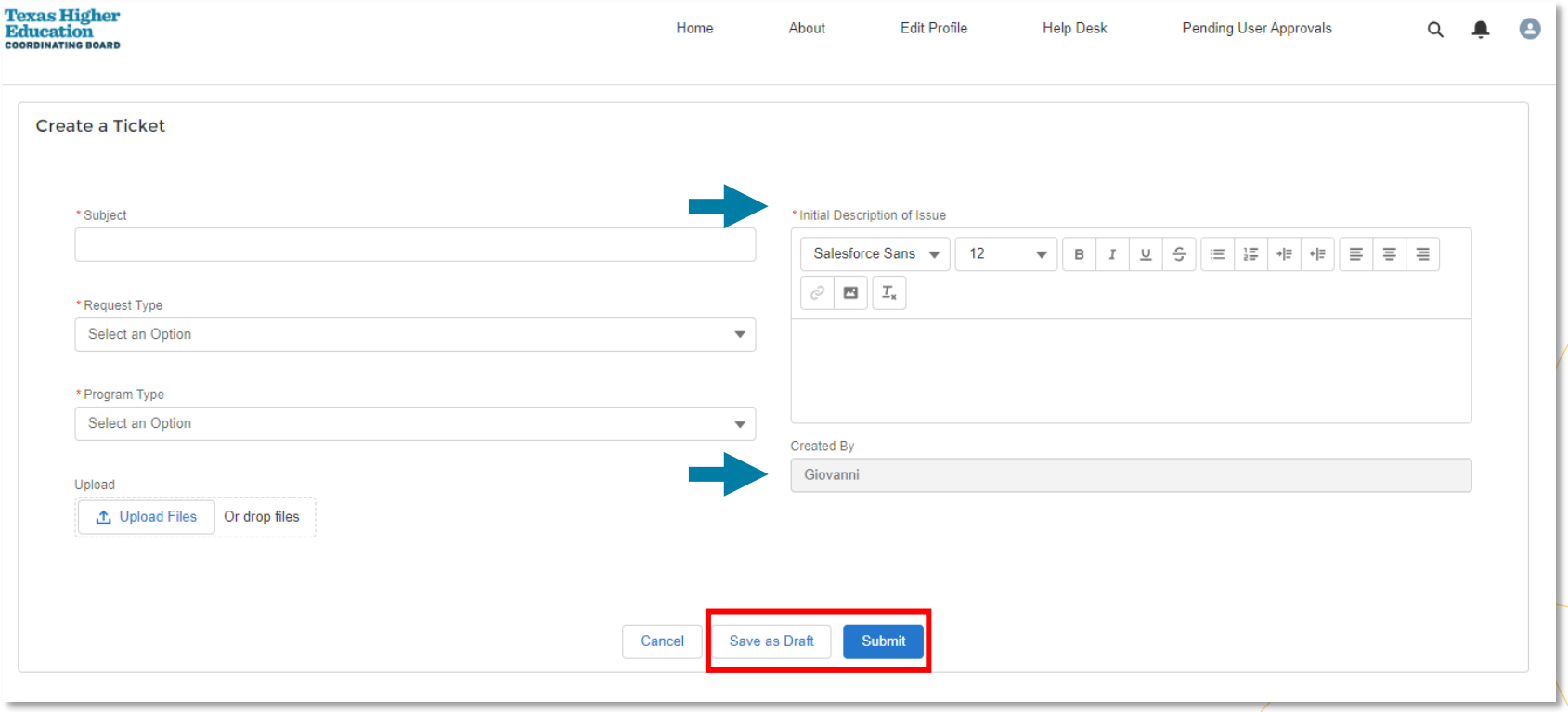
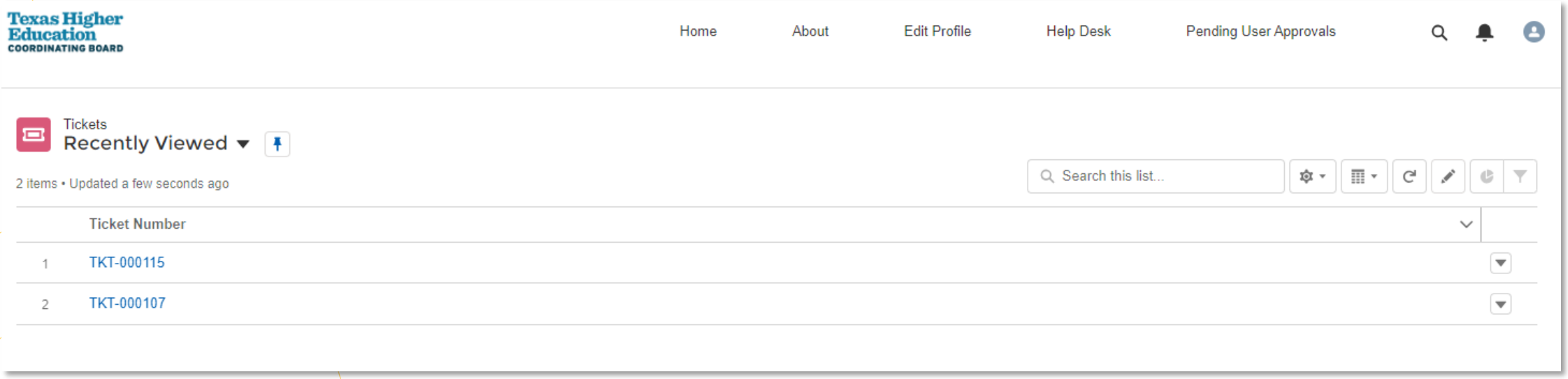
Help Desk
Pending User Approvals
Texas Higher Education COORDINATING BOARD
Submit a Ticket
To Submit a help desk ticket, click the "Create New Ticket" button below. A form will appear for you to complete. Once submitted, a THECB staff member will review your form and reach out to assist you.
Create a New Ticket
View Submitted Tickets
To review your submitted help desk tickets, please click the "Submitted Help Desk Tickets" button below.
Submitted Help Desk Tickets

Create a New Ticket

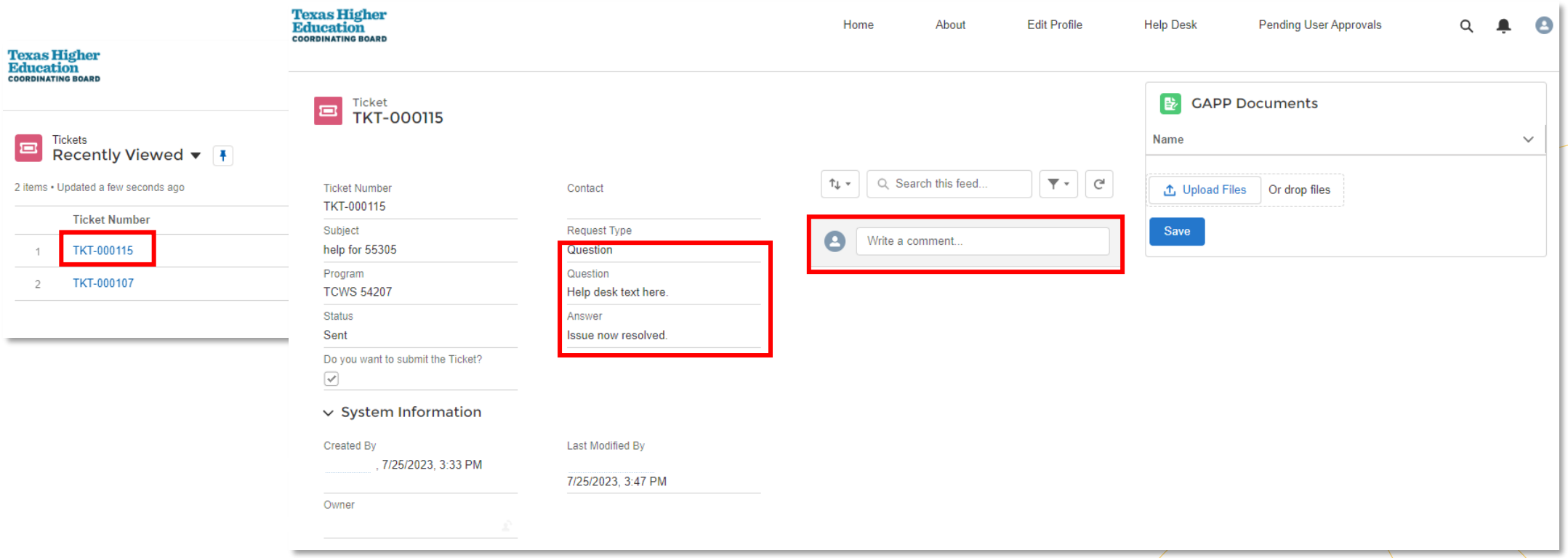


View Submitted Tickets

A history of all Help Desk tickets can be found under View Submitted Tickets



View Submitted Tickets



Deadlines and Reminders

Deadlines and Reminders

Deadlines

- Deadline to log in to your HelmNet Account before deactivation – **August 31, 2023**
- Deadline for institutions to certify FY 2024 TASSP Application – **September 29, 2023**

Reminders

- Comptroller Closure - **August 31 - September 1, 2023**
- Financial Aid Database (FAD) FY23- Cycle Three - First day to submit file – **September 20, 2023**

Recent Notifications

- State Financial Aid Process Updates, Reminders, and Resources Memo – **August 21, 2023**
- Fall 2023 Institutional Calendar

Contact Student Financial Aid Programs

FAS Contact Information for Institutions:

- FAS Institutional Phone Line
  - Institutions Only: **(844) 792-2640**

FAS Contact Information for the General Public:

- Texas Financial Aid Information Center Phone Line
  - General Public: **(888) 311-8881**

All can submit inquiries online through the CONTACT US web form.

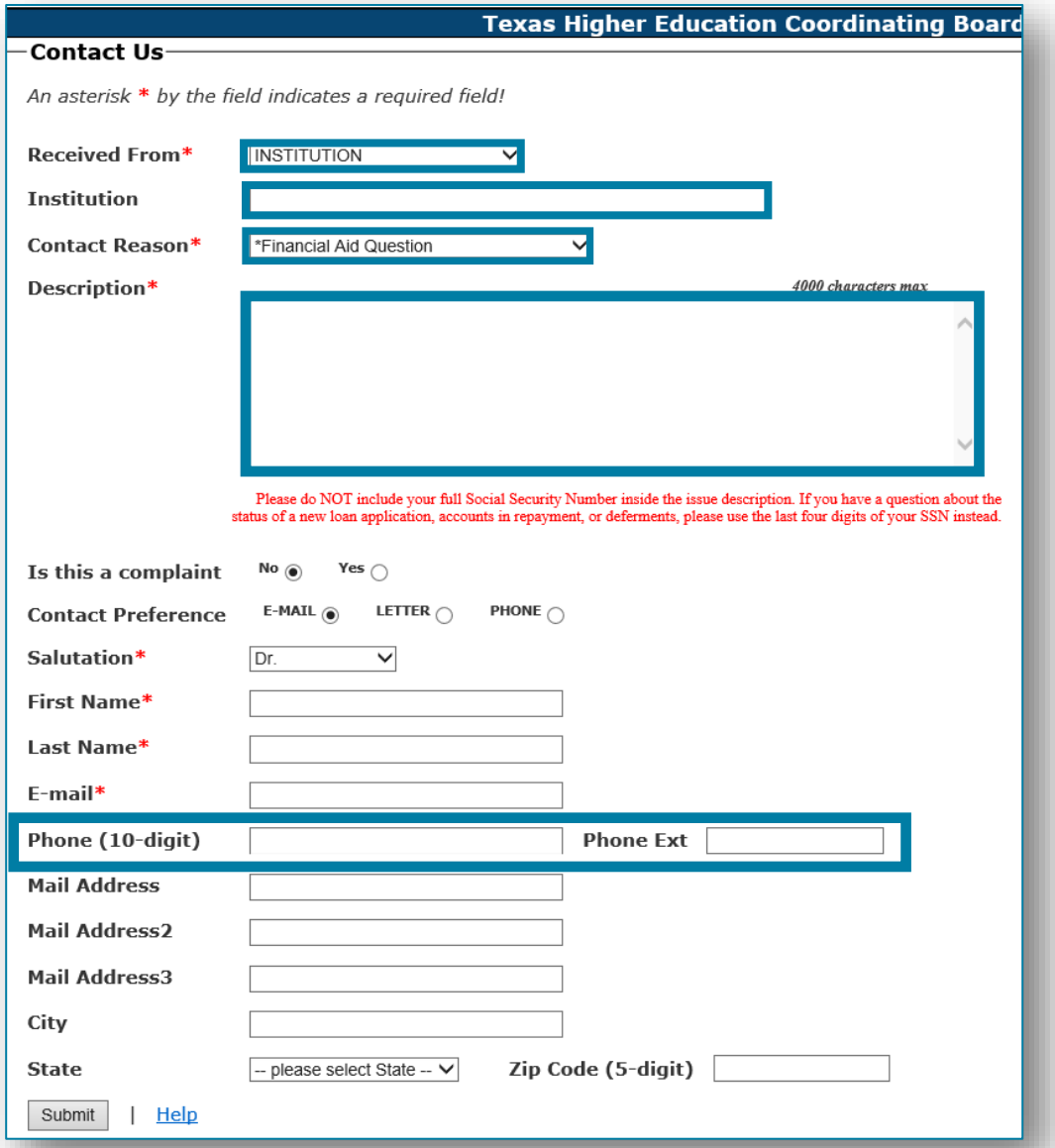
Phone Line Hours of Operation:
Mon-Fri
8 a.m. to 5 p.m.
(Closed daily from 12 to 1 p.m.)

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.
- Describe your inquiry in 4000 characters or less.

Provide the best **direct phone number** to reach you.



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Thank You!