

# State Financial Aid Monthly Webcast

September 13, 2023

# Topics of Discussion



Manageable Debt  
Calculation (MDC) for  
Loan Programs

Grant Aid & Processing  
Portal (GAPP): FY 2024  
Payment Process  
Overview

Deadlines, Reminders, &  
Notifications

Questions?

# Manageable Debt Calculation (MDC)

Loan Programs

# Loan Program Participation

## **CAL** and **FORWARD** Programs:

- Are NOT opt-in/opt-out programs
- Institutions must participate and certify a CAL or FORWARD loan for an eligible student based on the signed Program Participation Agreement executed by THECB
- [Title 19, TAC, Chapters 21 & 22](#)

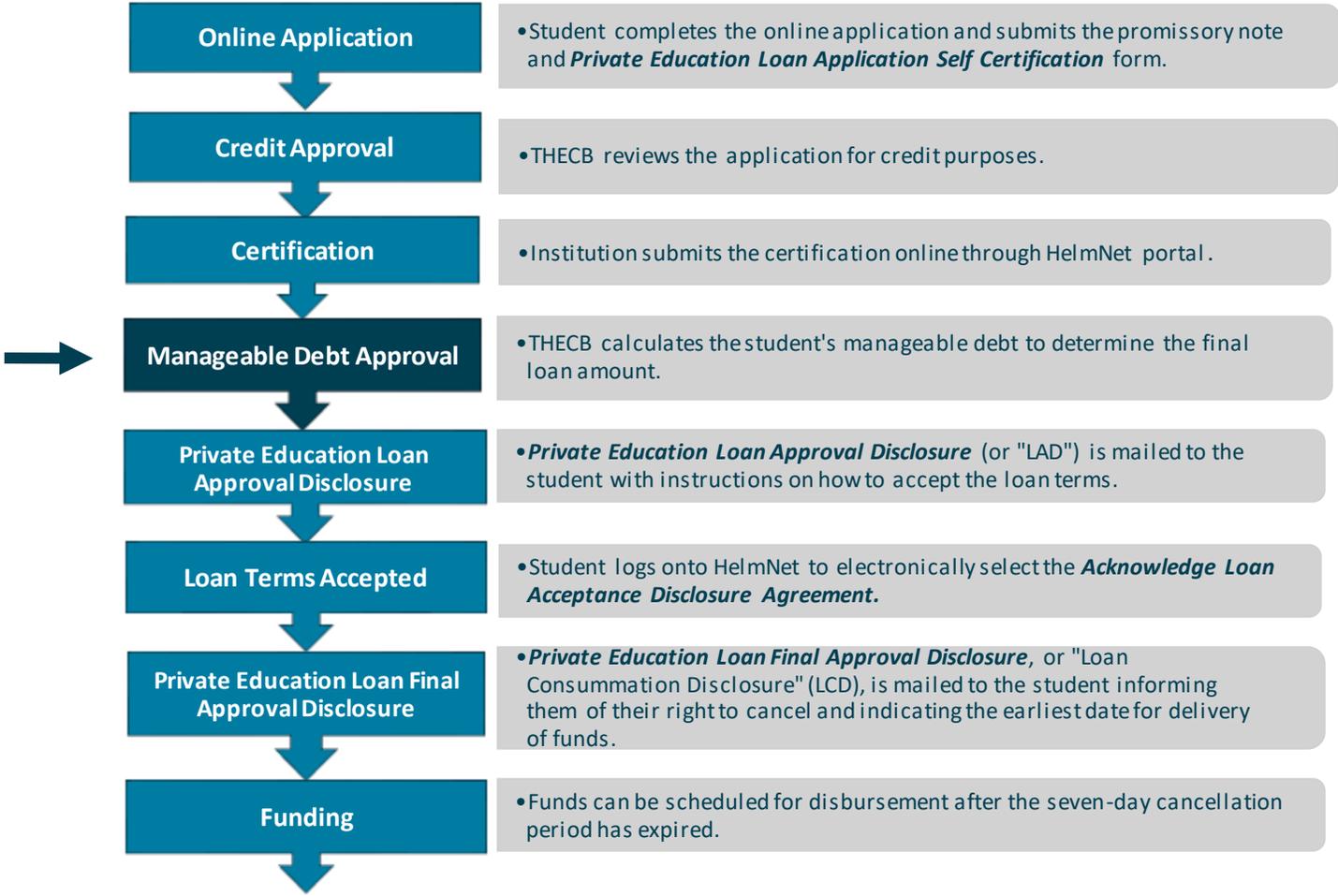


Note: THECB rules may require specific, additional opt-in or opt-out confirmation in order to be included in the allocation process for particular programs

# Application Process

College Access Loan (CAL)

# College Access Loan (CAL) Application Flow



# College Access Loan Application Checklist

Application status for \_\_\_\_\_ in the amount \_\_\_\_\_ ✖  
of \$9,500 (CLUID: 8120890003W00N043)

**Status: Incomplete**

Task	Completion Date	Responsibility
✓ Borrower Application Completed <a href="#">?</a>	2/12/2023	Borrower
✓ Borrower Application Signed <a href="#">?</a>	2/12/2023	Borrower
✓ Private Education Loan Applicant Self-Certification (BCF) Signed <a href="#">?</a>	2/12/2023	Borrower
✓ Cosigner Application Completed <a href="#">?</a>	2/12/2023	Cosigner
✓ Cosigner Application Signed <a href="#">?</a>	2/12/2023	Cosigner
✓ Credit Approved <a href="#">?</a>	2/12/2023	Lender
— Lender Approval Completed <a href="#">?</a>		Lender
✓ School Certification Completed <a href="#">?</a>	2/28/2023	School
— Loan Guaranteed <a href="#">?</a>		Lender
— Private Education Loan Approval Disclosure (LAD) Sent <a href="#">?</a>		Lender
— Private Education Loan Approval Disclosure (LAD) Accepted <a href="#">?</a>		Borrower
— Private Education Loan Final Approval (LCD) form Sent <a href="#">?</a>		Lender
— Required Right to Cancel Waiting Period <a href="#">?</a>		Borrower
— Ready to Disburse <a href="#">?</a>		Lender

HelmNet Task List shows:

- ✓ Credit Approved
- ✓ School Certification Completed

Lender Approval Completed is Pending MDC

# Loan Certification Updates

College Access Loan (CAL)

# Loan Certification Updates



- ✓ Program of Study
- ✓ Grade Level
- ✓ Not Eligible to Certify Option
- ✓ Manual Loan Certification

For more information on how to certify a loan, please refer to the August 30, 2022 webcast.

[Home](#) » [Our Work](#) » [Supporting Our Institutions](#) » [Student Financial Aid Programs](#) » [Stay Connected](#) » [Webcast Archives](#)

# Program of Study

**Programs of Study**

**Refine Program Category and Subcategory Dropdown Lists** (Optional)

If you would like to refine the program category and subcategory dropdown lists; you may enter in a program of study keyword or CIP code and then click the "Refine" button. If the results do not help you make a selection; click the "Clear" button to return to the full program category and subcategory dropdown lists.

**Program Category** (Select One)

- Agriculture and natural resources
- Architecture and engineering
- Arts
- Biology and life sciences
- Business
- Communications and journalism
- Computers statistics and mathematics
- Education
- Health
- Humanities and liberal arts
- Industrial arts consumer services and recreation
- Law public policy and social work
- Physical sciences**
- Psychology
- Social sciences
- Undeclared

**Program Subcategory**

40.XXXX - Physical sciences

- ✓ Institutions can search the Program Category
- ✓ Institutions must select the Program of Study from the dropdown list
- ✓ Program Subcategory is not required for CAL

# Grade Level

Enrollment Information	
Grade Level	Freshman
Enrollment Status	Full-Time
Academic loan period	08/28/2023 to 12/15/2023
Anticipated Graduation Date	08/29/2029

Institutions must:

- ✓ Select Grade Level
- ✓ Select Enrollment Status
- ✓ Verify Academic Loan Periods
- ✓ Confirm Anticipated Graduation Date

# Certification Eligibility

**Certification**

I have applied or cause to have applied the rules of the College Access and the Hinson-Hazlewood College Student Loan Programs and certify the following, to the best of my knowledge:

1. The borrower named on this application is an eligible student in accordance with the rules of the College Access and the Hinson-Hazlewood College Student Loan Programs,
2. The borrower is not incarcerated,
3. The borrower is eligible for a loan in the amount certified,
4. The disbursement schedule complies with the requirements of the College Access and the Hinson-Hazlewood College Student Loan Programs,
5. Based on records available and inquiry made, the borrower is not liable for an overpayment on any state or federal grant,
6. The information provided is true, complete, and accurate,
7. The borrower's request for the loan can be evidenced in our Financial Aid Office by the borrower's active OR passive confirmation of our offer of the proposed loan amount.

The amount of this loan may not exceed the difference between the cost of attendance and other forms of student assistance for which the student may be eligible. Other sources of student assistance include gifts, grants, scholarships, federal Perkins loans (to the extent that your institution has available Perkins funds), and Stafford loans (subsidized and unsubsidized), but not federal PLUS loans.

Not Eligible to Certify

Certify

**The application has been certified.**

Submit

Institutions must select one:

- ✓ To Certify
- ✓ Not Eligible to Certify

# Manual Loan Certification

- ✓ Beginning September 1, 2023, Institutions will manually certify applications through the HelmNet portal
- ✓ THECB will continue to send the School Certification Request (SCR) files in the CommonLine format.
- ✓ Institutions will not be able to return the school certification file back to the THECB using the CommonLine process
- ✓ There is no specific timeline as to when the CommonLine process will be available to the schools.



# Manageable Debt Calculation (MDC)

# Application Checklist

Application status for \_\_\_\_\_ in the amount \_\_\_\_\_ ✖  
of \$9,500 (CLUID: 8120890003W00N043)

**Status: Incomplete**

Task	Completion Date	Responsibility
✓ Borrower Application Completed <a href="#">?</a>	2/12/2023	Borrower
✓ Borrower Application Signed <a href="#">?</a>	2/12/2023	Borrower
✓ Private Education Loan Applicant Self-Certification (BCF) Signed <a href="#">?</a>	2/12/2023	Borrower
✓ Cosigner Application Completed <a href="#">?</a>	2/12/2023	Cosigner
✓ Cosigner Application Signed <a href="#">?</a>	2/12/2023	Cosigner
✓ Credit Approved <a href="#">?</a>	2/12/2023	Lender
— Lender Approval Completed <a href="#">?</a>		Lender
✓ School Certification Completed <a href="#">?</a>	2/28/2023	School
— Loan Guaranteed <a href="#">?</a>		Lender
— Private Education Loan Approval Disclosure (LAD) Sent <a href="#">?</a>		Lender
— Private Education Loan Approval Disclosure (LAD) Accepted <a href="#">?</a>		Borrower
— Private Education Loan Final Approval (LCD) form Sent <a href="#">?</a>		Lender
— Required Right to Cancel Waiting Period <a href="#">?</a>		Borrower
— Ready to Disburse <a href="#">?</a>		Lender

THECB completes the manageable debt calculation to determine final eligibility. Depending on the calculation, the loan could be approved, reduced, or canceled by the THECB.

# The Calculation

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Amount approved by THECB will depend on:

- ✓ Borrower's Program of Study
- ✓ Current Educational Debt



# Current Education Debt

## Included

- ✓ Education accounts that are open with an active balance on the tradeline (Experian)
- ✓ Private and federal loans
- ✓ New loans with a Loan Consummation Disclosure (LCD) generated
- ✓ Pending disbursements

## Not Included

- ✓ Paid and Closed accounts

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The Cosigner's debt is not included in the calculation

# Possible Outcomes after MDC Review



FULL LOAN AMOUNT  
APPROVED



REDUCED LOAN AMOUNT  
APPROVED



LOAN CANCELLED

# Manageable Debt Formulas

A	B	C	D	E	F	G	H	I	J	K	L
1	1	Loan Program Year	Year 1								
2	2	Details: APTU									Date 2/16/23

19	Cost of Attendance	APUS: Cost Attend
20	Less Other Estimated Financial Aid	APUS: Est Fin Aid
21	Difference	
22		

THECB Review (Credit Review, Laserfiche)				
Current Manageable Debt, Principal Balance of Student Loans				
Debt 1	\$1,118	Debt 7	\$10,000	Debt 13
Debt 2	\$3,500	Debt 8		Debt 14
Debt 3	\$3,595	Debt 9		Debt 15
Debt 4	\$2,000	Debt 10		Debt 16
Debt 5	\$2,750	Debt 11		Debt 17
Debt 6	\$10,000	Debt 12		Debt 18
Debt 19				Debt 20
				Debt 21
				Debt 22
				Debt 23
				Debt 24
Current Manageable Debt, Total			\$32,963	

35	Maximum Manageable Debt	\$79,067	
36	Less Current Manageable Debt	\$32,963	APU2: DEBT OTH
37	Allowable Manageable Debt	\$46,104	APU2: DEBT TTL
38	FORWARD Loan Amount Certified	\$10,000	

- ✓ Maximum Manageable Debt is determined by the Program Of Study

$$\text{COA} - \text{EFA} = \text{Unmet Cost}$$

- ✓ Unmet Cost must be equal to or less than the requested amount/certified amount
- ✓ Current Manageable Debt = All Open Educational Loans
- ✓ Maximum Manageable Debt - Current Manageable Debt = Allowable Manageable Debt
- ✓ Allowable Manageable Debt is the deciding factor for loan approval

# Full Loan Amount Approval

24	<b>Current Manageable Debt, Principal Balance of Student Loans</b>	
25	\$1,118	\$10,000
26	\$3,500	
27	\$3,595	
28	\$2,000	
29	\$2,750	
30	\$10,000	
31		
32	<b>Current Manageable Debt, Total</b>	<b>\$32,963</b>
33		
34	<b>Pre-Manageable Debt</b>	
35	Maximum Manageable Debt	\$79,067
36	Less Current Manageable Debt	\$32,963 <i>APU2: DEBT OTH</i>
37	<b>Allowable Manageable Debt</b>	<b>\$46,104</b> <i>APU2: DEBT TTL</i>
38	FORWARD Loan Amount Certified	\$10,000
39	Eligible FORWARD Loan Amount	\$10,000
40		
41	<b>THECB Review</b>	
42	Approved FORWARD Loan Amount	\$10,000
43		
44	<b>Post-Manageable Debt</b>	\$42,963
45		
46	<b>Future FORWARD Loan Eligibility</b>	\$36,104
47		
48	<b>Comments</b>	
	Approved FORWARD Loan Amount = Eligible FORWARD Loan Amount	

Manageable Debt Calculation (MDC) Fo

- ✓ Borrowers Current Manageable Debt is \$32,963
- ✓ Borrowers Allowable Debt is \$46,104 and the certified requested amount was \$10,000
- ✓ THECB would approve the Full Loan Amount of \$10,000

# Full Loan Amount Approved

Loan status: \_\_\_\_\_ the amount of \_\_\_\_\_ ✖

(CLUID: \_\_\_\_\_)

**Status: Incomplete**

Task	Completion Date	Responsibility
✓ Borrower Application Completed <a href="#">?</a>	8/21/2023	Borrower
✓ Borrower Application Signed <a href="#">?</a>	8/21/2023	Borrower
✓ Private Education Loan Applicant Self-Certification (BCF) Signed <a href="#">?</a>	8/21/2023	Borrower
✓ Credit Approved <a href="#">?</a>	8/21/2023	Lender
✓ Lender Approval Completed <a href="#">?</a>	9/7/2023	Lender
✓ School Certification Completed <a href="#">?</a>	9/6/2023	School
✓ Loan Guaranteed <a href="#">?</a>	9/7/2023	Lender
✓ Private Education Loan Approval Disclosure (LAD) Sent <a href="#">?</a>	9/11/2023	Lender
— Private Education Loan Approval Disclosure (LAD) Accepted <a href="#">?</a>		Borrower
— Private Education Loan Final Approval (LCD) form Sent <a href="#">?</a>		Lender
— Required Right to Cancel Waiting Period <a href="#">?</a>		Borrower
— Ready to Disburse <a href="#">?</a>		Lender

## HelmNet Task List

- ✓ Lender Approval Complete
- ✓ Loan Guaranteed
- ✓ Private Education Loan Approval Disclosure (LAD) Sent

# Reduced Loan Amount Approval

24	<b>Current Manageable Debt, Principal Balance of Student Loans</b>									
25	\$1,118	\$10,000								
26	\$3,500	\$20,000								
27	\$3,595	\$10,000								
28	\$2,000	\$10,000								
29	\$2,750									
30	\$10,000									
31										
32	<b>Current Manageable Debt, Total</b>		<b>\$72,963</b>							
33										
34	<b>Pre-Manageable Debt</b>									
35	<b>Maximum Manageable Debt</b>		<b>\$79,067</b>							
36	<b>Less Current Manageable Debt</b>		<b>\$72,963</b> <small>APU2: DEBT OTH</small>							
37	<b>Allowable Manageable Debt</b>		<b>\$6,104</b> <small>APU2: DEBT TTL</small>							
38	FORWARD Loan Amount Certified		\$10,000							
39	Eligible FORWARD Loan Amount		<b>\$6,104</b>							
40										
41	<b>THECB Review</b>									
42	Approved FORWARD Loan Amount		<b>\$6,104</b>							
43										
44	<b>Post-Manageable Debt</b>		\$79,067							
45										
46	<b>Future FORWARD Loan Eligibility</b>		<b>\$0</b>							
47										
48	<b>Comments</b>									
Approved FORWARD Loan Amount = Less Than School Certified Amount based to total current manageable debt										

- ✓ Borrowers Current Manageable Debt Total increased to \$72,963 which reduced the Allowable Manageable Debt to \$6,104
- ✓ THECB will reduce the certified loan amount from \$10,000 to \$6,104 and Approve

# Reduced Loan Amount Approved

Loan status for \_\_\_\_\_ amount of \_\_\_\_\_ ✖

(CLUID: \_\_\_\_\_)

**Status: Incomplete**

Task	Completion Date	Responsibility
✓ Borrower Application Completed <a href="#">?</a>	8/9/2023	Borrower
✓ Borrower Application Signed <a href="#">?</a>	8/9/2023	Borrower
✓ Private Education Loan Applicant Self-Certification (BCF) Signed <a href="#">?</a>	8/9/2023	Borrower
✓ Cosigner Application Completed <a href="#">?</a>	8/9/2023	Cosigner
✓ Cosigner Application Signed <a href="#">?</a>	8/9/2023	Cosigner
✓ Credit Approved <a href="#">?</a>	8/9/2023	Lender
✓ Lender Approval Completed <a href="#">?</a>	8/31/2023	Lender
✓ School Certification Completed <a href="#">?</a>	8/25/2023	School
✓ Loan Guaranteed <a href="#">?</a>	8/31/2023	Lender
✓ Private Education Loan Approval Disclosure (LAD) Sent <a href="#">?</a>	8/31/2023	Lender
✓ Private Education Loan Approval Disclosure (LAD) Accepted <a href="#">?</a>	9/9/2023	Borrower
✓ Private Education Loan Final Approval (LCD) form Sent <a href="#">?</a>	9/11/2023	Lender
— Required Right to Cancel Waiting Period (9/11/2023 - 9/20/2023) <a href="#">?</a>		Borrower
— Ready to Disburse on 9/26/2023 <a href="#">?</a>		Lender

## HelmNet Task List

- ✓ Lender Approval Complete
- ✓ Loan Guaranteed
- ✓ Private Education Loan Approval Disclosure (LAD) Sent

Amount of loan was reduced by THECB due to MDC

# Reduced Loan Amount Approved

**Texas Higher Education Coordinating Board**  
**STUDENT FINANCIAL AID PROGRAMS**  
PO Box 12788, Austin, TX 78711-2788  
800-242-3062 Fax: 512-427-6423  
www.hhloans.com

September 7, 2023

Re: College Access Loan

Student Name: Mickey Mouse  
Application # 8120890003W00N044  
Institution: THECB University  
Program of Study: Nursing Education

Our office recently received a certification for the College Access Loan (CAL) for student above. Changes have been made to the certified amount because the students' debt level for the chosen program of study exceeds the manageable debt level calculation.

One of the goals for the CAL program is for students to graduate with manageable student loan debt, meaning their monthly loan payment is no more than 10% of their gross earnings and they are able to pay off their student loan debt within 10 years. Additional information regarding eligibility for the CAL program is available under [Texas Administration Code, Chapter 22, Subchapter C](#).

You may view the changes online at [HelmNet \(HHLOANS\) Login](#).

For questions, contact Financial Aid Services at 844-792-2640 or through [CONTACT US](#) (select "Financial Aid Question" under Contact Reason).

Student Financial Aid Programs

For online account and payment information, please visit [www.hhloans.com](#)

Our office recently received a certification for the College Access Loan (CAL) for student above. Changes have been made to the certified amount because the students' debt level for the chosen program of study exceeds the manageable debt level calculation.

One of the goals for the CAL program is for students to graduate with manageable student loan debt, meaning their monthly loan payment is no more than 10% of their gross earnings and they are able to pay off their student loan debt within 10 years. Additional information regarding eligibility for the CAL program is available under [Texas Administration Code, Chapter 22, Subchapter C](#).

You may view the changes online at [HelmNet \(HHLOANS\) Login](#).

# Cancelled Loan Amount

24	<b>Current Manageable Debt, Principal Balance of Student Loans</b>										
25	\$1,118	\$10,000									
26	\$3,500	\$20,000									
27	\$3,595	\$10,000									
28	\$2,000	\$8,500									
29	\$2,750	\$7,550									
30	\$10,000										
31											
32	<b>Current Manageable Debt, Total</b>		\$79,013								
33											
34	<b>Pre-Manageable Debt</b>										
35	<b>Maximum Manageable Debt</b>		\$79,067								
36	<b>Less Current Manageable Debt</b>		\$79,013 <small>APU2: DEBT OTH</small>								
37	<b>Allowable Manageable Debt</b>		\$54 <small>APU2: DEBT TTL</small>								
38	FORWARD Loan Amount Certified		\$10,000								
39	Eligible FORWARD Loan Amount		\$54								
40											
41	<b>THECB Review</b>										
42	Approved FORWARD Loan Amount		\$0								
43											
44	<b>Post-Manageable Debt</b>		\$79,013								
45											
46	<b>Future FORWARD Loan Eligibility</b>		\$54								
47											
48	<b>Comments</b>										
DENIED = Allowable Manageable Debt/Eligible Loan amount is less than \$100.00											

- ✓ Borrowers Current Manageable Debt Total increased to \$79,013 which reduced the Allowable Manageable Debt to \$54
- ✓ THECB will cancel this loan because the Allowable Manageable Debt is less than \$100
- ✓ THECB cannot issue a loan for less than \$100

# Loan Cancelled by THECB

Application status for \_\_\_\_\_ in the amount \_\_\_\_\_ ✖

of \_\_\_\_\_

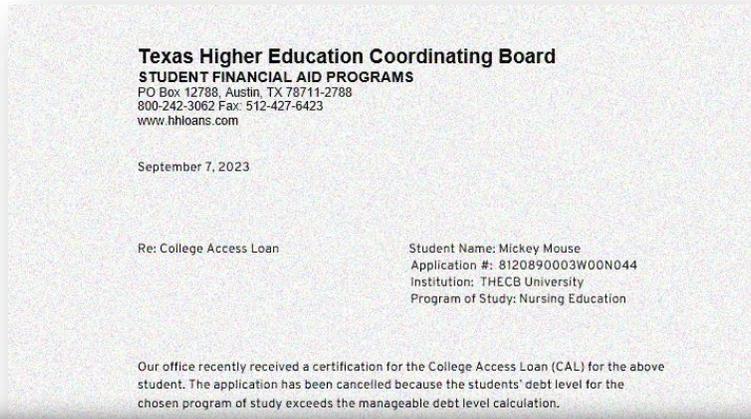
**Status: Canceled**

Task	Completion Date	Responsibility
✔ Borrower Application Completed <a href="#">?</a>	2/12/2023	Borrower
✔ Borrower Application Signed <a href="#">?</a>	2/12/2023	Borrower
✔ Private Education Loan Applicant Self-Certification (BCF) Signed <a href="#">?</a>	2/12/2023	Borrower
✔ Cosigner Application Completed <a href="#">?</a>	2/12/2023	Cosigner
✔ Cosigner Application Signed <a href="#">?</a>	2/12/2023	Cosigner
✔ Credit Approved <a href="#">?</a>	2/12/2023	Lender
✖ Lender Approval Completed <a href="#">?</a>		Lender
✖ School Certification Completed <a href="#">?</a>		School
✖ Loan Guaranteed <a href="#">?</a>		Lender
✖ Private Education Loan Approval Disclosure (LAD) Sent <a href="#">?</a>		Lender
✖ Private Education Loan Approval Disclosure (LAD) Accepted <a href="#">?</a>		Borrower
✖ Private Education Loan Final Approval (LCD) form Sent <a href="#">?</a>		Lender
✖ Required Right to Cancel Waiting Period <a href="#">?</a>		Borrower
✖ Ready to Disburse <a href="#">?</a>		Lender

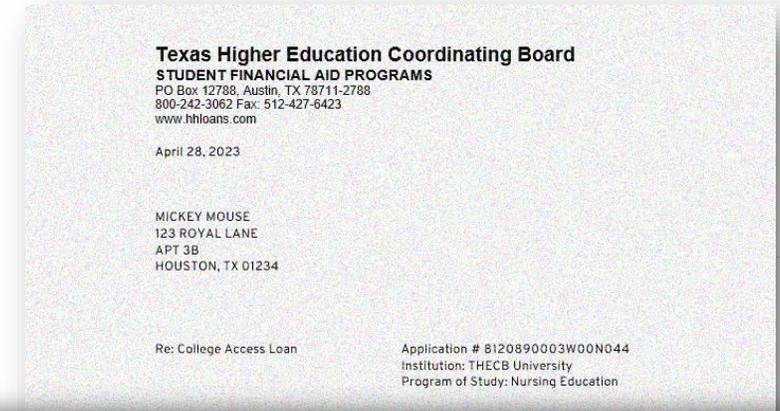
After THECB completes the Manageable Debt Calculation:

- ✔ HelmNet Status will show as Canceled
- ✔ All remaining tasks will contain a red "X"

# Loan Cancelled by THECB



Letter emailed to the  
**INSTITUTION's**  
Financial Aid Director



Letter is mailed to the **STUDENT**



Our office recently received a certification for the College Access Loan (CAL) for the above student. The application has been cancelled because the students' debt level for the chosen program of study exceeds the manageable debt level calculation.

One of the goals for the CAL program is for students to graduate with manageable student loan debt, meaning their monthly loan payment is no more than 10% of their gross earnings and they are able to pay off their student loan debt within 10 years. Additional information regarding eligibility for the CAL program is available under [Texas Administration Code, Chapter 22, Subchapter C](#).

You may view the changes online at [HelmNet \(HHLOANS\) Login](#).

We regret to inform you that we are unable to continue processing your request for the College Access Loan (CAL).

You are not eligible to receive funding under the CAL program because the debt level you will accrue while enrolled in your chosen program of study exceeds the manageable debt level calculation. One of the goals and eligibility requirements of the CAL program is for students to graduate with manageable student loan debt, meaning their monthly loan payment is no more than 10% of their gross earnings and they are able to pay off their student loan debt within 10 years. Additional information regarding eligibility for the CAL program is available under Texas Education Code, Chapter 52 or [Texas Administrative Code, Chapter 22, Subchapter C](#).

For additional assistance, please contact Customer Support Services at 800-242-3062, Monday through Friday, 8:00 a.m. to 5:00 p.m., CST.

# Loan Canceled by Student or School

Application status for ANGELO STATE UNIVERSITY in the amount of \$4,055 (CLUID: 8120890003WH5B01E) ✕

**Status: Canceled by the School on 8/31/2023**

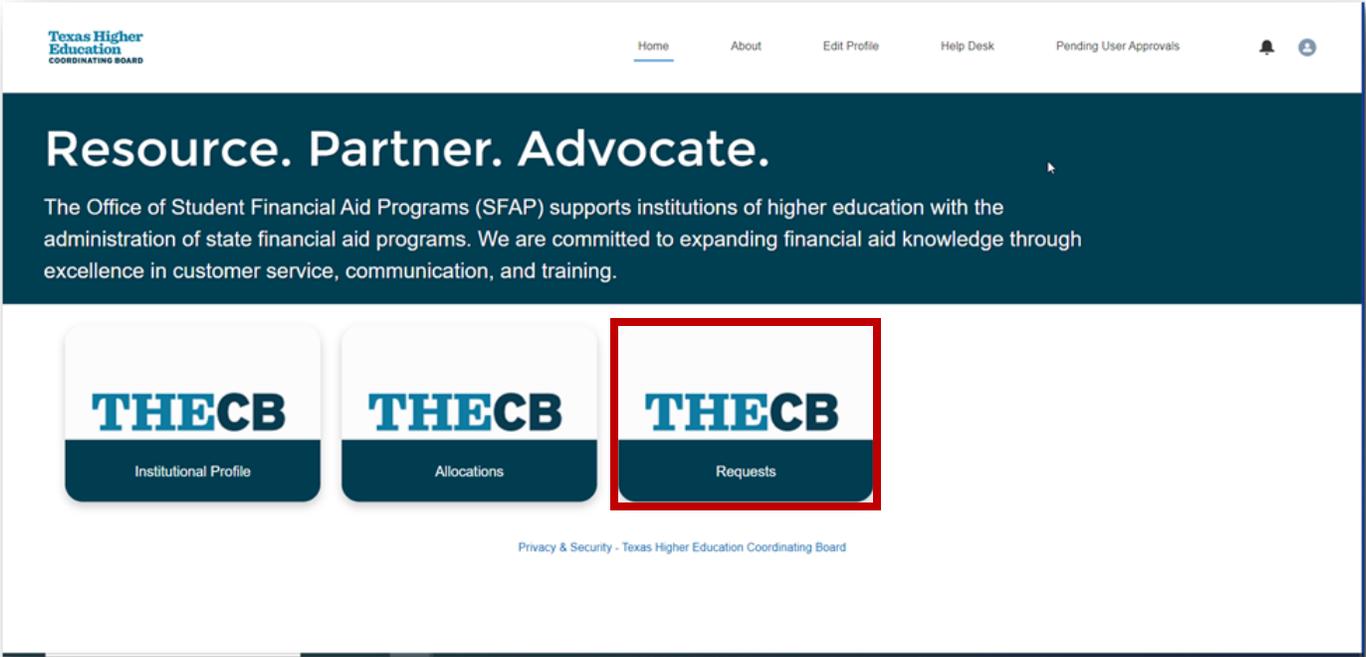
Task	Completion Date	Responsibility
✓ Borrower Application Completed <a href="#">?</a>	8/11/2023	Borrower
✓ Borrower Application Signed <a href="#">?</a>	8/11/2023	Borrower
✓ Private Education Loan Applicant Self-Certification (BCF) Signed <a href="#">?</a>	8/11/2023	Borrower
✓ Cosigner Application Completed <a href="#">?</a>	8/11/2023	Cosigner
✓ Cosigner Application Signed <a href="#">?</a>	8/11/2023	Cosigner
✓ Credit Approved <a href="#">?</a>	8/11/2023	Lender
✗ Lender Approval Completed <a href="#">?</a>		Lender
✗ School Certification Completed <a href="#">?</a>		School
✗ Loan Guaranteed <a href="#">?</a>		Lender
✗ Private Education Loan Approval Disclosure (LAD) Sent <a href="#">?</a>		Lender
✗ Private Education Loan Approval Disclosure (LAD) Accepted <a href="#">?</a>		Borrower
✗ Private Education Loan Final Approval (LCD) form Sent <a href="#">?</a>		Lender
✗ Required Right to Cancel Waiting Period <a href="#">?</a>		Borrower
✗ Ready to Disburse <a href="#">?</a>		Lender

No communication is sent when a school or student cancels a loan.

# Payment Process Overview

Grant Aid and Processing Portal (GAPP)

# GAPP Requests



To submit a request, institutions will need to click the Request tile from the Home screen.

# Types of Requests

The screenshot displays the THECB portal interface. At the top left is the THECB logo. The navigation bar includes links for Home, About, Edit Profile, and Help Desk, along with search, notification, and user profile icons. Below the navigation bar, there is a 'Recently Viewed' section with a dropdown arrow. A red box highlights a horizontal menu containing four request types: 'Payment Request', 'Transfer Request', 'Return of Funds', and 'Update Student Count'. Below this menu, a table lists two items with checkboxes and dropdown arrows.

	<input type="checkbox"/>	IR Name	
1	<input type="checkbox"/>	IR-00053	▼
2	<input type="checkbox"/>	IR-00052	▼

Institutions can submit:

- ✓ Payment Request
- ✓ Return of Funds
- ✓ Update Student Count
- ✓ Transfer Request

# Who can submit GAPP Requests?

- ✓ Primary Point of Contact (PPC)
- ✓ Secondary Point of Contact (SPC)
- ✓ Reporting Official (RO)

Please review the State Financial Aid Webcast presented on August 31<sup>st</sup>, 2023, titled *Grant and Aid Processing Platform training – Setting Up User Profiles, if you need an overview of User Roles.*

# Payment Requests

Grant Aid and Processing Portal (GAPP)

# Payment Requests

🖥️ Recently Viewed ▾

2 items • Updated a few seconds ago

- Payment Request
- Transfer Request
- Return of Funds
- Update Student Count

🔍 Search this list... ⚙️ 📄 🔄 📄

	<input type="checkbox"/> IR Name	
1	<input type="checkbox"/> IR-00053	▾
2	<input type="checkbox"/> IR-00052	▾

After clicking the Request tile from the Home screen, select Payment Request.

# Payment Requests

- ✓ Select the program
- ✓ Fiscal year and remaining allocation amount will auto populate
- ✓ Enter amount and number of students
- ✓ Check the acknowledge box
- ✓ Submit

The screenshot shows the 'Payment Request' form in the THECB system. The form is titled 'Payment Request' and has a progress bar at the top with four stages: 'Review in Progress' (highlighted), 'Cancelled', 'Approved', and 'Paid'. The form fields are as follows:

- Request Type:** A dropdown menu with 'Payment Request' selected.
- \*Program:** A dropdown menu with 'Bilingual Education Program - 36009' selected.
- \*Amount:** A text input field containing '\$50.00'.
- \*Fiscal Year:** A dropdown menu with '2024' selected.
- \*Number of Students:** A text input field containing '1'.
- Remaining Allocation Amount:** A text input field containing '\$91,623.00'.
- Total Number of Students:** A text input field that is currently empty.
- Last Payment Request For Program:** An unchecked checkbox.
- Acknowledgement:** A checked checkbox with the text: 'I acknowledge that submission of a payment request serves as confirmation that the institution understands the timely distribution requirements outlined in TAC Rule 22.2'.

At the bottom right of the form, there are two buttons: 'Close' and 'Submit'.

Note: If there are no new students, enter "0" (zero).

# Payment Requests

<input type="checkbox"/>	IR Name ↑	Program	Payment Request A...	External Status	Submitted By	Submitted Date
1	<input type="checkbox"/> IR-00013	Texas Grants	\$500	Approved	Rita Book	8/9/2023
2	<input type="checkbox"/> IR-00023	Work-Study Mentorship	\$300	Review in Progress	Paige Turner	8/15/2023
3	<input type="checkbox"/> IR-00024	Work-Study Mentorship	\$150	Review in Progress		

**Payment Request**

Request Type: Payment Request

\*Amount: \$150000

\*Number of Students: 100

Total Number of Students: 100

\*Program: TEXAS Grant

\*Fiscal Year: 2024

Remaining Allocation Amount: \$30,853,720.00

Last Payment Request For Program

Acknowledgement:

I acknowledge that submission of a payment request serves as confirmation that the institution understands the timely distribution requirements outlined in TAC Rule 22.2

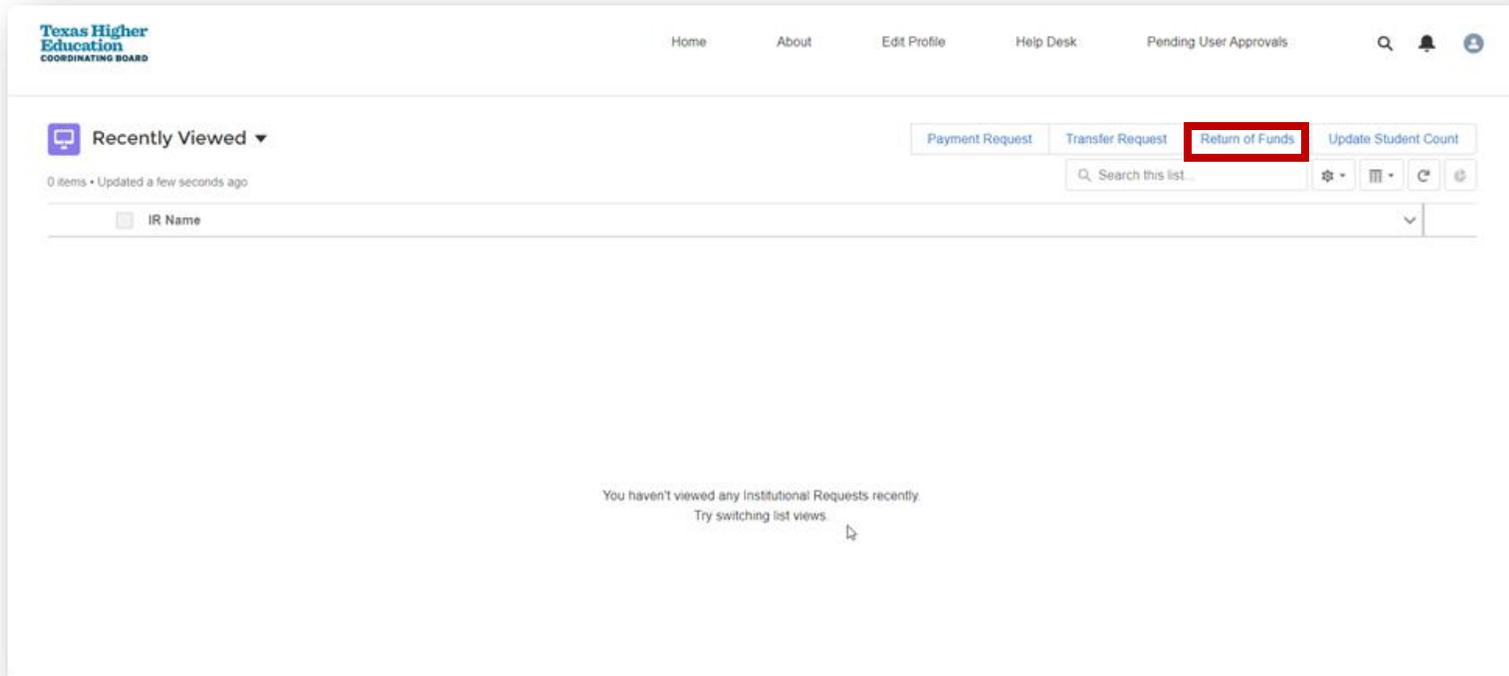
Buttons: Close, Cancel Request

- ✓ You can review the request from payment history
- ✓ You can cancel the request before THECB reviews it
- ✓ The requester will receive an email.

# Return of Funds

Grant Aid and Processing Portal (GAPP)

# Return of Funds



After clicking the Request tile from the Home screen, select Return of Funds.

# Return of Funds

Texas Higher Education  
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Home About Edit Profile Help Desk Pending User Approvals

Pending Submitted for Approval Cancelled Return Processed

**Return of Funds**

\*Request Type  
Return of Funds

\*Refund Amount  
\$500.00

\*Number of Students  
1

\*Program  
Texas Grants

\*Appropriation Year  
2023

\*Reason  
Test

Close Save As Draft Submit

- ✓ Select the program
- ✓ Select the appropriation year
- ✓ Type reason for the return
- ✓ Enter refund amount
- ✓ Enter number of students
- ✓ Save as draft or submit

Note: If there is not a student count adjustment needed, enter "0" (zero).

# Return of Funds

The screenshot displays the THECB Return of Funds interface. The top part shows a list of two items, with IR-00017 highlighted in a red box. The bottom part shows a detailed view of the 'Submitted for Approval' status for IR-00017, including fields for Request Type, Return Amount, Number of Students, Program, Appropriation Year, and Reason.

IR Name	Submitted By	Submitted Date	External Status	Return Amount
IR-00014	Rita Book	8/9/2023	Return Processed	\$150
IR-00017	Rita Book	8/9/2023	Submitted for Approval	\$100

**Return of Funds**

\* Request Type: Return of Funds

\* Return Amount: \$100

\* Number of Students: 1

\* Program: Texas Grants

\* Appropriation Year: 2023

\* Reason: testing

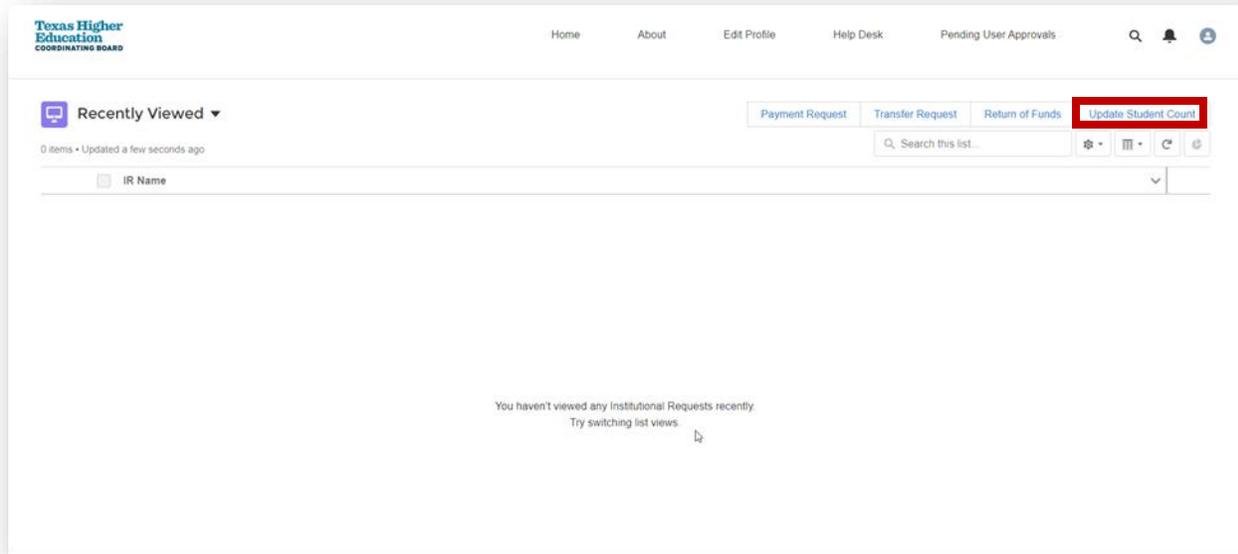
Buttons: Close, Cancel Request

- ✓ After submitting, the request moves to *Submitted for Approval*
- ✓ Institutions will receive an email confirmation of the return of funds
- ✓ Reminder: Institutions must follow the EFT instructions to return the funds back to THECB.

# Update Student Count

Grant Aid and Processing Portal (GAPP)

# Update Student Count



After clicking the Request tile from the Home screen, select Update Student Count.

# Update Student Count

## Update Student Count

Request Type

Payment Request

Total Number of Students

\* Number of Students

\* Program

Select an Option

\* Fiscal Year

Select an Option

\* Change Type

Select an Option

Close

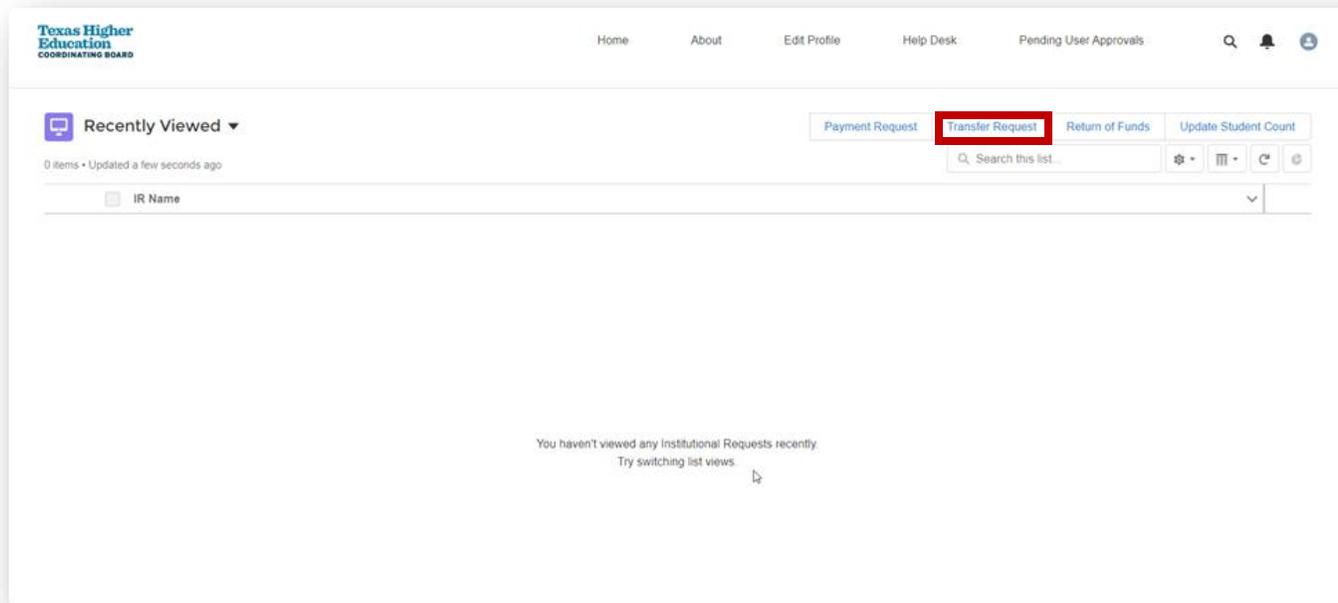
Submit

- ✓ Select program
- ✓ Select fiscal year
- ✓ Select change type
- ✓ Enter the number of students
- ✓ Select submit
- ✓ Institutions will receive an email regarding the request

# Transfer Requests

Grant Aid and Processing Portal (GAPP)

# Transfer Requests



Transfer requests will now be submitted by the institution to the THECB using an online Authority to Transfer form in the GAPP Portal for FY2024. An official notification will be sent to institutions to advise transfer of funds is open to request. All transfer of funds requests must be submitted by July 1, 2024.

Note: Further training on Transfer Request will be conducted at a later date and communication will be sent to all institutions.

# Deadlines, Reminders & Notifications

# Deadlines, Reminders, & Notifications

## Deadlines

- FAST Program Participation Agreement: 9/29
- FAD Initial File Submission for FY23 Cycle 3: 10/6
- FAST Educationally Disadvantaged Confirmation Roster: 10/15

## Reminders

- Financial Aid Advisory Committee Meeting: 9/14
- Financial Aid Database FY23- Cycle 3 First day to submit file: 9/20

## Recent Notifications

- Financial Aid for Swift Transfer (FAST) Program FY 2024 Participation Agreement Memo: 8/31
- UPDATE: State Financial Aid FY 2025 Priority Deadline Memo: 8/29
- College Access Loan (CAL) Interest Rate Change Memo: 8/24
- Future Occupations & Reskilling Workforce Advancement to Reach Demand (FORWARD) Loan Interest Rate Change Memo: 8/24
- State Financial Aid Process Updates, Reminders, and Resources Memo: 8/21

# Contact Student Financial Aid Programs

The following phone line is available for the public:

## Texas Financial Aid Information Center

- Public Line: **(888) 311-8881**

## Borrower Services

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

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 Line  
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.
- ✓ Describe your inquiry in **4000 characters or less**.

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

**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](#)



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Thank You!