

# Texas Transfer Grant Pilot Program

September 1, 2022



# Topics of Discussion



Program Reminders

Requesting Reimbursement and Returning Funds Overview

Additional Resources

Questions

# Program Reminders

# Program Administration

## Awarding

- The amount of this grant must NOT be reduced unless the total amount of the Transfer Grant plus other aid exceeds the student's COA.
- Reduce loans and work-study prior to reducing Transfer Grants

## Enrollment Eligibility

- Eligible students **MUST** enroll in **at least 9 SCHs** as of the institution's census date.

## Over Awards

- If a recipient receives assistance that exceeds their COA, the institution is not required to adjust the award unless the sum of the excess resources is greater than \$300.

# Selective Service Criteria

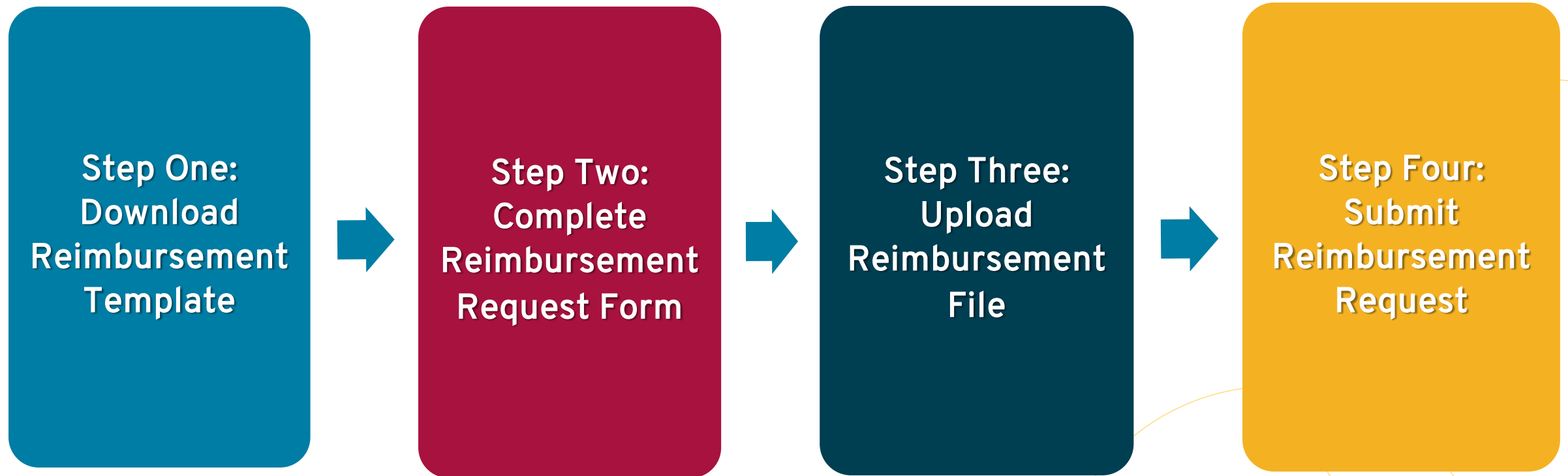
**Q: Are Transfer Grant funds subject to the Selective Service criteria?**

**A: Yes. Under Texas Education Code (TEC), Title 3, Section 51.9095, an individual must file a statement of their selective service status with the institution confirming registration or exemption. This statute applies to:**

- all state-funded financial aid, and
- federal funds or gifts and grants accepted by this state (including federal aid or private donations that pass through the state Treasury or Governor's office).
  - I.E., GEER, state-appropriated funds, etc.

# Requesting Reimbursement

# Requesting Reimbursement



# Step One: Reimbursement Template

Institution Name:		ABC University						
Complete each data field below for <u>ALL</u> eligible students who received a Texas Transfer Grant disbursement.								
Recipient Data								
To receive reimbursement, a student must have been enrolled in at least nine semester credit hours (SCHs) through institutional census.								
FICE	SSN	Last Name	First Name	DOB	# Hours Enrolled through census	Disbursed Amount	Semester	Explanation - <u>ONLY</u> if Disbursed Amount is less than \$5000
123456	123456789	Doe	John	19990406	9	\$ 5,000.00	Fall 22	
							Fall 22	
							Fall 22	

Enter 6-digit FICE

DOB: YYYYMMDD

SSN: No dashes

Save the file in the following format: 012345\_TTGReimbursement\_SemesterYYYY

Example: 012345\_TTGReimbursement\_Fall2022



# Step Two: Reimbursement Request Form

Complete ALL fields.

- Select Institution Type.
- Select Institution FICE, Name, and Allocation Amount.
- Enter total Reimbursement Amount.
- Enter Student Count.

The screenshot shows a digital form titled "2022-23 (FY23) Transfer Grant Reimbursement Request Form" from the Texas Higher Education Coordinating Board. The form is set against a dark teal background. It contains several input fields: "Institution Type" with a dropdown menu showing "Select"; "Institution FICE, Name, and Allocation Amount" with a yellow-highlighted example "Ex: 001234 ABC University \$350,000"; "Reimbursement Amount" with a yellow-highlighted input "275000"; and "Student Count Requested" with a yellow-highlighted input "55". A note below the student count field states: "Enter the count of recipients submitted for reimbursement. Do not include special characters or commas."

<https://app.smartsheet.com/b/form/3418e02fd85a43edaa3c152b68f39e94>

## Step Three: Upload Reimbursement File

- Click **browse files**, or
- **Drag and drop** a copy into the file upload box

**Recipient File Upload \***

Upload a copy of your institution's Transfer Grant Reimbursement file that contains a list of ALL eligible students who received a Texas Transfer Grant disbursement.

**Example: 012345\_TTGR reimbursement\_Fall2022**

## Step Four: Submit Request

- Click the box above the submit button to receive a copy of your responses
- Click **Submit** to send the form to the THECB

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

*By submitting this form, I certify that the amounts reported on this request form are accurate as of today's date. I further understand the importance of the accuracy of this information, as it may be reported to the Texas Legislature and is subject to review during a program audit.*

☐ Send me a copy of my responses

☒ Send me a copy of my responses

**Submit**

Email address  
**John.Doe@abcuniversity.edu**

# Submission Deadline

Requests for reimbursements must be received by the THECB no later than **Oct. 14, 2022.**



Deadline

# Returning Funds

# Return of Funds Form (RFF)

Complete all required fields.

- FICE
- Institution Name
- Contact Information
- Award Year
- Program
- Amount
- Number student awards being refunded
- Detailed refund explanation (including student full Name, SSN, and DOB impacted by the refund)
- Name/Title of Certifying Official
- Date
- Click **Submit**

## Grants and Special Programs

The screenshot shows the 'Return of Funds Form (RFF)' for 'Grants and Special Programs'. The form is divided into several sections:

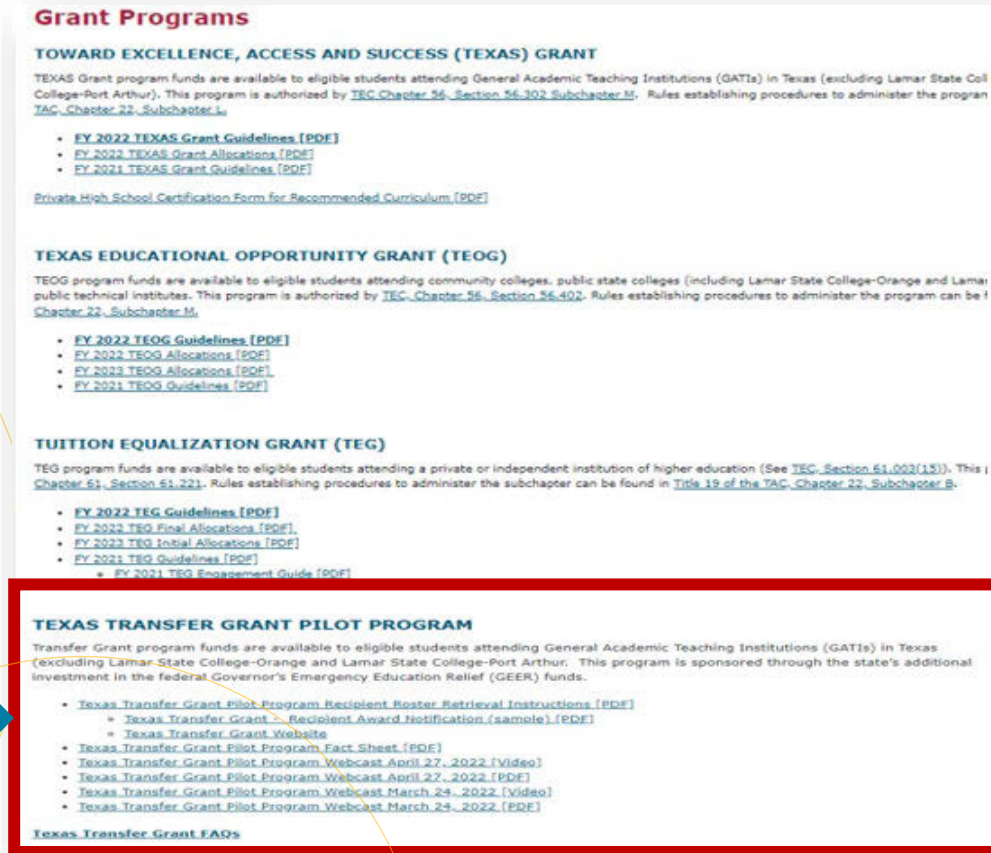
- Header:** Date: 08-04-2022, FICE Code: [redacted], Institution: [redacted].
- Contact Information:** A table with columns: Position, Name, Email, Phone. Rows include Financial Aid Director, Reporting Official, and Business Office Contact.
- Award Year:** 2022-2023 (dropdown).
- Program:** Geer TX Transfer Grant 32518 (dropdown).
- Grant programs require a breakdown in type of funds.**
- Grant Program Breakdown:** A table with columns: Type of Funds, Amount\*, Number of student awards being returned. Rows include Initial, Renewal, and Total.
- Special Program Breakdown:** A table with columns: Amount\*, Number student awards being refunded\*\*.
- Detailed Refund Explanation Required:** A text area with a red border. It contains the text: "Type detailed refund explanation and student information. Example: John Doe, 123456789, 19990201".
- Certifying Official:** A section with fields for Name/Title and Date, with a Date Picker icon.
- Summary:** A section with fields for Award Year, Program/PCA, Amount, and Total Student Count. A red box with white text says "Summary fields are AUTO POPULATED".
- Buttons:** Reset and Submit.

<https://www1.thecb.state.tx.us/apps/SpecialPrograms/returnfunds.cfm>

# Additional Resources

# Websites

## Institutions



**Grant Programs**

**TOWARD EXCELLENCE, ACCESS AND SUCCESS (TEXAS) GRANT**

TEXAS Grant program funds are available to eligible students attending General Academic Teaching Institutions (GATIs) in Texas (excluding Lamar State College-Port Arthur). This program is authorized by [TEC Chapter 36, Section 36.302 Subchapter M](#). Rules establishing procedures to administer the program [TAC Chapter 22, Subchapter L](#).

- [FY 2022 TEXAS Grant Guidelines \[PDF\]](#)
- [FY 2022 TEXAS Grant Allocations \[PDF\]](#)
- [FY 2021 TEXAS Grant Guidelines \[PDF\]](#)

[Private High School Certification Form for Recommended Curriculum \[PDF\]](#)

**TEXAS EDUCATIONAL OPPORTUNITY GRANT (TEOG)**

TEOG program funds are available to eligible students attending community colleges, public state colleges (including Lamar State College-Orange and Lamar public technical institutes). This program is authorized by [TEC Chapter 36, Section 36.402](#). Rules establishing procedures to administer the program can be found in [Chapter 22, Subchapter M](#).

- [FY 2022 TEOG Guidelines \[PDF\]](#)
- [FY 2022 TEOG Allocations \[PDF\]](#)
- [FY 2023 TEOG Allocations \[PDF\]](#)
- [FY 2021 TEOG Guidelines \[PDF\]](#)

**TUITION EQUALIZATION GRANT (TEG)**

TEG program funds are available to eligible students attending a private or independent institution of higher education (See [TEC, Section 61.002\(13\)](#)). This is authorized by [Chapter 51, Section 51.221](#). Rules establishing procedures to administer the subchapter can be found in [Title 19 of the TAC, Chapter 27, Subchapter B](#).

- [FY 2022 TEG Guidelines \[PDF\]](#)
- [FY 2022 TEG Final Allocations \[PDF\]](#)
- [FY 2023 TEG Initial Allocations \[PDF\]](#)
- [FY 2021 TEG Guidelines \[PDF\]](#)
- [FY 2021 TEG Engagement Guide \[PDF\]](#)

**TEXAS TRANSFER GRANT PILOT PROGRAM**

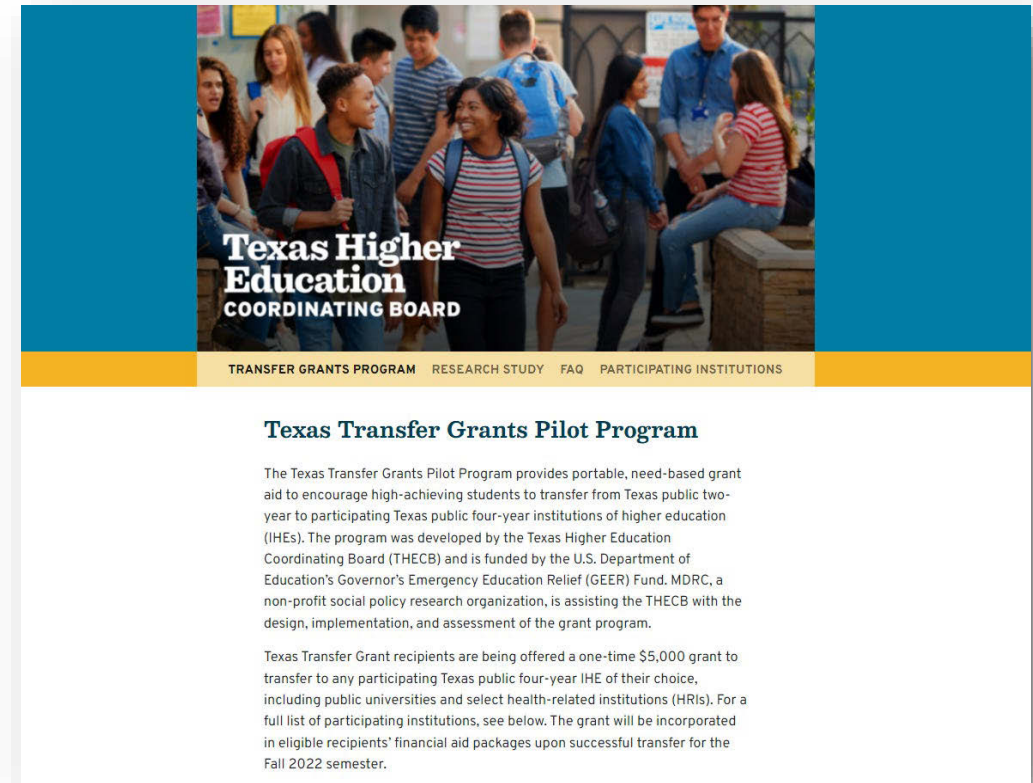
Transfer Grant program funds are available to eligible students attending General Academic Teaching Institutions (GATIs) in Texas (excluding Lamar State College-Orange and Lamar State College-Port Arthur). This program is sponsored through the state's additional investment in the federal Governor's Emergency Education Relief (GEER) funds.

- [Texas Transfer Grant Pilot Program Recipient Roster Retrieval Instructions \[PDF\]](#)
  - [Texas Transfer Grant - Recipient Award Notification \(samote\) \[PDF\]](#)
  - [Texas Transfer Grant Website](#)
- [Texas Transfer Grant Pilot Program Fact Sheet \[PDF\]](#)
- [Texas Transfer Grant Pilot Program Webcast April 27, 2022 \[Video\]](#)
- [Texas Transfer Grant Pilot Program Webcast April 27, 2022 \[PDF\]](#)
- [Texas Transfer Grant Pilot Program Webcast March 24, 2022 \[Video\]](#)
- [Texas Transfer Grant Pilot Program Webcast March 24, 2022 \[PDF\]](#)

**Texas Transfer Grant FAQs**

<https://www.highered.texas.gov/institutional-resources-programs/student-financial-aid-programs/program-resources/grant-programs/>

## Students



**Texas Higher Education COORDINATING BOARD**

[TRANSFER GRANTS PROGRAM](#) [RESEARCH STUDY](#) [FAQ](#) [PARTICIPATING INSTITUTIONS](#)

**Texas Transfer Grants Pilot Program**

The Texas Transfer Grants Pilot Program provides portable, need-based grant aid to encourage high-achieving students to transfer from Texas public two-year to participating Texas public four-year institutions of higher education (IHEs). The program was developed by the Texas Higher Education Coordinating Board (THECB) and is funded by the U.S. Department of Education's Governor's Emergency Education Relief (GEER) Fund. MDRC, a non-profit social policy research organization, is assisting the THECB with the design, implementation, and assessment of the grant program.

Texas Transfer Grant recipients are being offered a one-time \$5,000 grant to transfer to any participating Texas public four-year IHE of their choice, including public universities and select health-related institutions (HRIs). For a full list of participating institutions, see below. The grant will be incorporated in eligible recipients' financial aid packages upon successful transfer for the Fall 2022 semester.

<https://www.texastransfergrants.org/>



# Program Resources

## TEXAS TRANSFER GRANT PILOT PROGRAM

### Roster Retrieval Instructions

Texas Higher  
Education  
COORDINATING BOARD

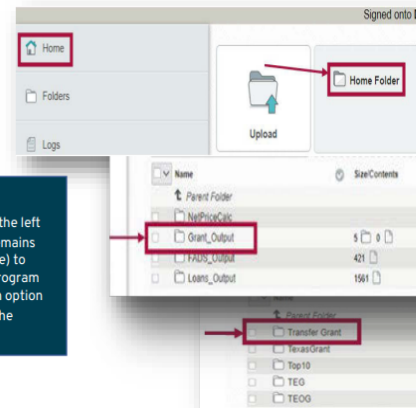
This document gives participating public institutions step-by-step instructions on how to retrieve subsequent updates through the [MOVEit DMZ portal](#).

Z is the file transfer protocol system that safely collects, stores, manages, and distributes sensitive data. A complete [MOVEit DMZ User Guide](#) is available on the Student Financial Services [Program Resources](#).

**B:** MOVEit DMZ login portal at [v.theccb.state.tx.us](#).  
Enter the institution's **Username** and **Password**.  
Click **Sign On** to log in.  
MOVEit DMZ is managed solely by the Director of Information Technology, and institutions are issued only one ID and Password.

**O:** HOME page:

Click on **Home Folder**  
Click on **Grant\_Output**  
Click on **Transfer Grant**



### Quick Access Tip:

In the **HOME** page, use the left navigation bar (remains visible throughout interface) to directly access to the program using the drop down option **To Folder** and select the applicable folder.

## TEXAS TRANSFER GRANT PILOT PROGRAM

### Requesting Reimbursement and Returning Funds

Texas Higher  
Education  
COORDINATING BOARD

This resource document gives eligible public institutions step-by-step instructions on how to complete the [2022-23 \(FY23\) Transfer Grant Reimbursement Request Form](#).

### Requesting Reimbursement

#### Step One: Download the [Transfer Grant Reimbursement Template](#).

Verify enrollment eligibility before adding a student to the Transfer Grant Reimbursement spreadsheet.

A. Enter the following for the requesting institution:

- Institution Name

B. Enter the following identifiers for **ALL** recipients:

- Institution FICE (6-digit)
- SSN (no dashes)
- Last Name
- First Name
- DOB (YYYYMMDD)  
Example: April 6, 1999, is entered as **19990406**.
- # Hours Enrolled **through census**
  - Recipient **MUST** have been enrolled in at least nine semester credit hours (SCHs) through census to request reimbursement.
- Disbursed Amount
- Semester (auto populated)
- Explanation - Enter comments **ONLY** if the disbursed amount is less than the \$5000 awarded amount.

C. Save the file in the following format: **6-digit FICE\_TTGRReimbursement\_SemesterYYYY**

- Example: 012345\_TTGRReimbursement\_Fall2022

## TEXAS TRANSFER GRANT PILOT PROGRAM Fact Sheet

Texas Higher  
Education  
COORDINATING BOARD

This fact sheet highlights specific requirements to assist participating institutions with the administration of the Texas Transfer Grant Pilot Program.

### Purpose

To provide portable need-based aid to high-achieving transfer students who are low-income and to help mitigate financial barriers to vertical transfer for students.

This program is sponsored through the state's additional investment in the federal Governor's Emergency Education Relief (GEER) funds and provides a unique opportunity for Texas to test an innovative approach to offering financial support to a critical student population.

### Award Amount

A Transfer Grant award for fall 2022 **must not** exceed **\$5,000** per eligible, enrolled student.

The amount of a Transfer Grant **must not** be reduced unless the total amount of the Transfer Grant plus other aid exceeds the student's Cost of Attendance (COA). THECB requests that institutions reduce loan and work-study before reducing Transfer Grants.

### Over Awards

If an award has been disbursed and a recipient receives other assistance that exceeds their COA, the institution **is not** required to adjust the award unless the sum of the excess resources is greater than \$300.

### Eligibility for Disbursement

To be eligible for disbursement of a fall 2022 Texas Transfer Grant, a selected student **must**:

- Be enrolled in a minimum of **9 semester credit hours (SCH)** as of the institution's census day (also referred to as Official Reporting Date - ORD).

## INSTITUTIONS

Eligible public institutions **are required** to complete an **Interagency Contract (IAC)** with the Texas Higher Education Coordinating Board (THECB) to receive funding for the Texas Transfer Grant Pilot Program.

### Program Administration

Institutions must complete the following steps to administer Transfer Grant awards:

#### STEP 1. RETRIEVE RECIPIENT ROSTERS

- Retrieve (download) rosters through the [MOVEit DMZ portal](#) in the **Transfer Grant Folder**.
  - Roster updates will be made available to institutions on a weekly basis.

#### STEP 2. PACKAGE GRANTS

- Apply the grant to the student's financial aid package.
  - Prioritize the Transfer Grant over non-grant forms of aid, such as loans and work study.

#### STEP 3. DISBURSE FUNDS

- Disburse grant funds on the student's institutional account using institutional funds.

#### STEP 4. REQUEST REIMBURSEMENT

- To request reimbursement, the certifying official must:
  - confirm eligible recipient enrollment of at least 9 SCHs as of the institution's census date, and
  - submit **Certification of Payment** totals for expended Transfer Grant awards to THECB.

**Note:** A Certification of Payment **must** be received by the THECB no later than **Oct. 14, 2022**.



# Program Resources

## Archived Webcasts



## Transfer Grant FAQs

### Texas Transfer Grant Frequently Asked Questions

#### General Transfer Grant Administration Questions

- [+ If institutions disburse funds 10 days prior to their census date, typically the second week of school, the student may NOT be able to receive the grant. Should institutions pull back this grant?](#)
- [+ To confirm, this grant can exceed a student's financial need if it does not go over the cost of attendance \(COA\) by \\$300 \(over the financial need\).](#)
- [+ Are these funds subject to the Selective Service criteria since institutions will initially disburse the grant using institutional funds?](#)
- [+ Can a student receive both the TEXAS Grant and the Transfer Grant in the same semester/term?](#)
- [+ Can these funds count towards TEXAS Grant matching funds?](#)
- [+ Should these funds be disbursed like the Reskilling and/or GEER emergency funds so they will not impact current or future aid?](#)
- [+ Will the Transfer Grant have to be reported on the Financial Aid Database \(FAD\) report?](#)
- [+ An institution disbursed funds to a student meeting the enrollment requirement at census, but six weeks later, fully withdrew the student. What portion of the grant?](#)

<https://www.highered.texas.gov/institutional-resources-programs/student-financial-aid-programs/program-resources/grant-programs/transfer-grant-faq9/>

# Contact Information

# Contacting Student Financial Aid Programs

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 at any time.



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

# Submitting 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

Enter in Description field: Transfer Grant Program

Provide the best direct phone number

**Texas Higher Education Coordinating Board**

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**Contact Us**

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

Received From\* INSTITUTION

Institution

Contact Reason\* \*Financial Aid Question

Description\*

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\* Dr.

First Name\*

Last Name\*

E-mail\*

Phone (10-digit)  Phone Ext

Mail Address

Mail Address2

Mail Address3

City

State -- please select State -- Zip Code (5-digit)

| [Help](#)

# Questions?