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Texas Higher Education Coordinating Board

Tuition Equalization Grant (TEG)

2017 Need Survey Instruction Manual

Financial Aid Services

Texas Higher Education Coordinating Board

Phone: (844) 792-2640

Contact us by completing an online inquiry form.

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TEG Need Survey

Purpose

The purpose of the TEG Need Survey is to collect data that is used by the Texas Higher Education Coordinating Board (THECB) to calculate the institution's allocation.

Calendar

The deadline to finalize the TEG Need Survey is **November 15, 2017**.

File Format

Files must be submitted using an Excel spreadsheet and must have the following naming convention:

Example: Six-digit FICE Code _ Fall 2017 Need Survey
                005555_Fall 2017 Need Survey

New Data Element

Student ID: This ID can be either a social security number or a school assigned number for a student with no SSN.
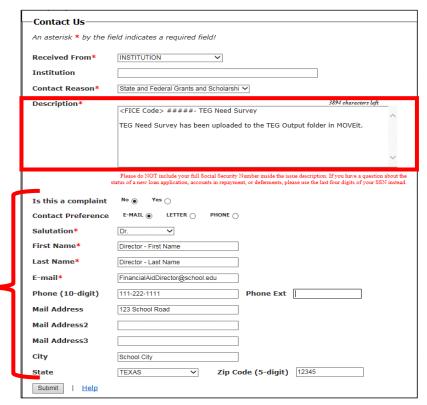
File Submission

Files must be uploaded using the MOVEit DMZ web portal to the institution **TEG Output Folder**.

Once the TEG Need Survey has been uploaded to the **TEG output folder**, an online notification must be submitted using the **CONTACT US** link on the [Student Financial Aid Programs Information Website](#).

Description must include the following information:
<FICE Code> ##### - TEG Need Survey
TEG Need Survey has been uploaded to the TEG Output folder in MOVEit.

All other necessary contact information must also be included in the notification.

Survey Requirements

All students who are eligible to receive a TEG award for fall 2017 should be included in this survey (even if the student will not receive an award).

Eligibility Requirements (19 TAC, Section 22.24)

TO RECEIVE A FIRST AWARD, A STUDENT MUST:
✓ Be classified by the institution as a Texas resident ✓ Be registered with Selective Service, or be exempt ✓ Have applied for financial aid assistance ✓ Demonstrate financial need ✓ Be enrolled at least 3/4 time ✓ Be an undergraduate **or** graduate student enrolled in a degree plan leading to a **first** associate, baccalaureate, master's, professional, or doctoral degree (excluding degree plans that are intended to lead to religious ministry) ✓ Not have earned a degree for which they are currently enrolled ✓ Not be a recipient of an athletic scholarship (i.e. the student is obliged to play an intercollegiate sport as a result of receiving the scholarship) during the semester(s) TEG is awarded ✓ Be required to pay more tuition than is required at a comparable public college or university and be charged no less than the tuition required of all similarly situated enrolled at the institution
TO RECEIVE A SUBSEQUENT AWARD, A STUDENT MUST:
✓ Meet all the **FIRST AWARD** requirements ✓ Maintain satisfactory academic progress

✋ **Stop**: National Merit Scholarship finalists are no longer eligible for a TEG award and there is no grandfather clause in the provision.

Satisfactory Academic Progress (SAP) (19 TAC, Section 22.24)

At the end of the first academic year, a student must meet the SAP requirements set by the institution to be eligible for a continuation award.

At the end of the second academic year, and all years thereafter, undergraduates must have completed 24 semester credit hours (SCH) in the most recent academic year, with a 75% completion rate for hours attempted in that year, and must have a minimum 2.5 cumulative GPA. Graduate students must have completed 18 SCH in the most recent academic year, with a 75% completion rate for hours attempted in that year, and must have a minimum 2.5 cumulative GPA.

Note: A student who is ineligible for a TEG award based on the general requirements, may be deemed eligible under a hardship provision.

Tuition Differential

Tuition differential is defined as the difference between the tuition paid at a private or independent institution and the tuition the student would have to pay to attend a comparable public institution in Texas. Fees are not included in this calculation, only tuition rates.

The Southern Association of Colleges and Schools (SACS) identifies institutions by the highest levels of degrees they offer. These levels are being used by the THECB to identify "comparable" institutions for the purpose of calculating tuition differentials. The following table shows average resident undergraduate and graduate tuition rates per SCH for public institutions at various SACS levels for the 2017-18 academic year. These amounts should be used by the institution to derive tuition differentials by using the student's total SCH and multiplying the tuition rate provided.

SACS LEVEL	UNDERGRADUATE TUITION RATE PER SCH	GRADUATE TUITION RATE PER SCH
Associate Degree Level 1	$57	n/a
Baccalaureate Degree Level 2	$66	n/a
Master's Degree Level 3	$194	$268
Three or fewer Doctoral Degrees Level 5	$182	$239
Four or more Doctoral Degrees Level 6	$232	$329

The average public institution rates for law school students are as follows:
- Resident: $918 per SCH
- **Non-Resident Not Applicable**

For Example:
- Levels 2, 3, 5 and 6 independent institutions (other than Southwestern Christian College) should compare the charges to the average charges of public institutions at the same levels.

Note: Remember to compare a student's calculated tuition differential to the maximum TEG award, to ensure the annual award does not exceed it.

TEG Need Survey Template

THECB will provide institutions with an Excel spreadsheet template to input student data.
The chart below provides a description of the fields required on the template for each student.

Column	Field Names	Descriptions
A.	*Record Number	Each row is pre-numbered to reflect the student data record in the survey roster.
B.	**Student ID	Report the social security number (SSN) or a school assigned number for a student with no SSN.
C.	Name	Report the student's name in the following format: **Last Name, First Name, Middle Initial**
D.	Student Classification	Report the student's classification: 1 = **Undergraduate** (student seeking a **First** associate or bachelor's degree) 2 = **Graduate** (student seeking a **First** master's, doctoral, or professional degree)
E.	Cost of Attendance (COA)	The student's 9-month COA based on enrollment status.
F.	Expected Family Contribution (EFC)	Report the calculated 9-month EFC based on enrollment status.
G.	*Gross Need	This is an auto-calculated entry based on the student's reported **COA** minus the reported **EFC**.
H.	Pell Grant	Report the amount of Pell Grant the student is or could be eligible to receive based on the student's enrollment status.
I.	Categorical Aid	Report the amount of aid brought to the institution by the student and not packaged by the financial aid office (e.g. private scholarships, Texas Rehabilitation Commission funds, Workforce Investment Act (formerly JTPA), VA benefits,)
J.	*Adjusted Gross Need	This is an auto-calculated entry based on the student's **Gross Need** minus **Pell Grant** and **Categorical Aid**.
K.	Tuition Differential	Report: **Y** = If the Student's Tuition Differential limits the TEG award maximum **N** = If the Student's Tuition Differential does not affect the TEG award maximum
L.	TEG Need	Report the **least** of the following: ▪ Student's Adjusted Gross Need ▪ Student's Tuition Differential ▪ TEG maximum award amount $3,364
M.	Exceptional Need	Report the **least** of the following: ▪ Student's Adjusted Gross Need minus TEG Need ▪ Student's Tuition Differential minus TEG Need ▪ TEG maximum exceptional need award amount of $1,682 Note: Exceptional Need is defined as students with expected family contributions (EFCs) less than or equal to $1,000 (Undergraduates only).

*Field is auto-populated   ** Personally Identifiable Information (PII)

Data Record Issues

An edit-check system is embedded in the template to help institutions identify data record issues.
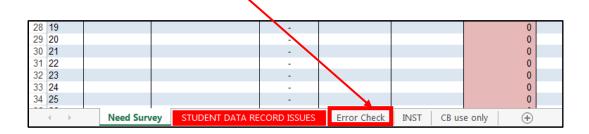
- **Total Issues Count** provides the institution with cumulative number of **Issues** found in the records provided.

- If a student record is flagged, the worksheet will highlight the record green in the **Edit** column.

- For each student that has an **Edit**, the associated **Issue** will be listed in the appropriate edit-check column for that specific record.

Student Data Record Issues

Total Issues Count	0	0	0	0	0	0	0	0	0	0	0
			EC-1	EC-2	EC-3	EC-4	EC-5	EC-6	EC-7	EC-8	EC-9	EC-10

Rec Num	Name	Edit	Gross Need <= $0	AGN <= $0	TEG Need <= $0	Tuition Differential limits award amount (Y or N)	TEG Need = AGN when AGN < $3,364	TEG Need = $3,364 when AGN >= $3,364	TEG Need = $3,364 when TD = Y and EFC > $1,000	TEG Need > $3,364	Grad student with Exceptional Need	Exceptional TEG Need given to UG with EFC > $1,000
21	0		-	-	-	-	-	-	-	-	-	-
22	0		-	-	-	-	-	-	-	-	-	-
23	0		-	-	-	-	-	-	-	-	-	-
24	0		-	-	-	-	-	-	-	-	-	-
25	0		-	-	-	-	-	-	-	-	-	-

Above each column, there is a link to the **Error Check (EC) Table code**.

EC-1	EC-2	EC-3	EC-4	EC-5	EC-6	EC-7	EC-8
Gross Need <= $0	AGN <= $0	TEG Need <= $0	Tuition Differential limits award amount (Y or N)	TEG Need = AGN when AGN < $3,364	TEG Need = $3,364 when AGN >= $3,364	TEG Need = $3,364 when TD = Y and EFC > $1,000	TEG Need > $3,364

The **Error Check Table** provides a detailed description of the issue, with the record and the edits needed to resolve the issue. Institutions can refer to the table for methods to resolve **Student Data Record Issues.**

28	19			-			0
29	20			-			0
30	21			-			0
31	22			-			0
32	23			-			0
33	24			-			0
34	25			-			0

| ◄ ► | **Need Survey** | STUDENT DATA RECORD ISSUES | Error Check | INST | CB use only | ⊕ |

Error Check Table

EC#	ISSUE	Resolution
EC-1	Student's Gross Need is at or below $0.	Students cannot be included in the survey.
EC-2	Student's Adjusted Gross Need is at or below $0.	Students cannot be included in the survey.
EC-3	Student's TEG Need is at or below $0.	Students cannot be included in the survey.
EC-4	Student's Tuition Differential is not **Y** or **N**.	Entry must be **Y** or **N**.
EC-5	Adjusted Gross Need is less than $3,364 and TEG Need does not equal Adjusted Gross Need.	If Tuition Differential does not limit award amount, then TEG Need must be equal to or less than Adjusted Gross Need.
EC-6	Adjusted Gross Need is equal to or greater than $3,364 and TEG Need is less than $3,364 and Tuition Differential was reported as **N**.	If Tuition Differential does not limit award amount, then TEG Need must equal $3,364.
EC-7	Tuition Differential was reported as **Y** and TEG Need is $3,364.	If Tuition Differential limits award amount, then TEG Need must be less than $3,364.
EC-8	TEG Need award greater than $3,364.	TEG Need must be equal to or less than $3,364.
EC-9	Graduate student with need of greater than $0.	Exceptional Need must be $0.
EC-10	Undergraduate student with an EFC greater than $1,000 with an Exceptional Need of greater than $0.	Exceptional Need must be $0.
EC-11	Undergraduate student with TEG Need less than $3,364 and Exceptional Need is greater than $0.	Exceptional Need must be $0.
EC-12	Tuition Differential was reported as **Y** and Exceptional Need is $1,682.	If Tuition Differential limits award amount, then Exceptional Need must be less than $1,682.
EC-13	Tuition Differential was reported as **Y** and TEG Need is equal to $3,364.	If Tuition Differential limits award amount, then TEG Need must be less than $3,364.
EC-14	Student's Adjusted Gross Need less than $5,046 and TEG Need plus Exceptional Need is greater than Adjusted Gross Need.	If Tuition Differential does NOT limit award amount, then TEG Need plus Exceptional Need must be equal to or less than Adjusted Gross Need.
EC-15	Adjusted Gross Need is greater than $5,046 and TEG Need plus Exceptional Need is less than $5,046.	If Tuition Differential does NOT limit award amount, then TEG Need plus Exceptional Need cannot be less than $5,046.
EC-16	Tuition Differential was reported as **Y** and TEG Need plus Exceptional Need equals Adjusted Gross Need, and Adjusted Gross Need is more than $5,046.	If Tuition Differential limits the award amount then TEG Need plus Exceptional Need must be less than $5,046.
EC-17	The TEG Need and/or Exceptional TEG Need amounts are in excess of program maximums.	TEG Need must be equal to or less than $3,364 and Exceptional Need must be equal to or less than $1,682.

Resources

CONTACT FINANCIAL AID SERVICES
By phone: (844) 792-2640
Contact us by completing an online inquiry form and use one of the following contact reasons below:

Contact Reason - Exemptions/Waiver Programs • All state exemption and waiver programs including EAE **Contact Reason -** Student Loan - School Info Request • CAL • BOT • TASSP	**Contact Reason -** State and Federal Grants and Scholarships • TEXAS Grant • TEOG • TEG • Top 10% Scholarship • Bilingual Education Scholarship Program **Contact Reason -** Work-Study Programs • TCWS • TCWS Mentorship

OTHER RESOURCES FOR INSTITUTIONS	
General program information for institutions	Student Financial Aid Programs Information Website
Texas Program Statutes	Texas Education Code
Texas Program Rules	Texas Administrative Code
Information concerning programs, procedures, allocations, and other topics will be communicated to institutions through the GovDelivery system. To receive these communications, interested individuals must subscribe.	GovDelivery