

2020-21

State Financial Aid Program Guidelines

60x30TX



Texas Higher Education Coordinating Board

Student Financial Aid Programs
Texas Higher Education Coordinating Board

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TOWARD EXCELLENCE, ACCESS, AND SUCCESS GRANT

The Texas Higher Education Coordinating Board (THECB) Program Guidelines are intended to support institutions by highlighting requirements that appear in the Texas Education Code (TEC) and Title 19 of the Texas Administrative Code (TAC). When administering this program, institutions should always refer to the applicable statutes and rules. The information provided in this document is to be used solely as a resource and does not supersede the statute and/or rules for this program.

PROGRAM AUTHORITY AND PURPOSE

The Toward EXcellence, Access, & Success (TEXAS) Grant Program is authorized by [TEC Chapter 56, Section 56.302 Subchapter M](#). Rules establishing procedures to administer the program can be found in [Title 19 of the TAC, Chapter 22, Subchapter L](#). The program is funded by appropriations authorized by the Texas Legislature and from any gifts and grants to the program. The purpose of the TEXAS Grant Program is to provide financial assistance to eligible students attending Texas public institutions of higher education.

STATE PRIORITY DEADLINE ([TEC, SECTION 56.008](#) and [19 TAC, SECTION 22.6](#))

The THECB provides a uniform priority deadline for applications that qualify for state-funded financial assistance in an academic year. General Academic Teaching Institutions (GATIs) in Texas (*including* Lamar State College-Orange and Lamar State College-Port Arthur), as defined in [TEC, Section 61.003\(3\)](#), must publicize and use **January 15** as the state priority deadline for identifying eligible students to be given priority in receiving awards through the state financial aid programs. Institutions may define how their students must meet the priority deadline and are encouraged to adopt a policy describing the actions that students must take to meet the deadline.

ELIGIBLE INSTITUTIONS

GATIs (*excluding* Lamar State College-Orange and Lamar State College-Port Arthur) as defined in [TEC, Section 61.003 \(3\)](#) and Health-Related Institutions (HRIs) as defined in [TEC, Section 61.003\(5\)](#) are eligible to make both initial year (IY) and renewal year (RY) awards from a single allocation.

ELIGIBILITY

INITIAL ELIGIBILITY REQUIREMENTS

TO RECEIVE AN IY AWARD, A STUDENT MUST:

- ✓ Be classified by the institution as a Texas resident
- ✓ Be registered with Selective Service, or be exempt
- ✓ Have applied for any available financial aid assistance
- ✓ Have financial need
- ✓ Be enrolled at least 3/4 time
- ✓ Not have earned a baccalaureate degree
- ✓ Be enrolled in a baccalaureate degree program at a public 4-year or HRI institution as a first-time undergraduate and qualify through one of the following four pathways:
 - **High School Graduation Pathway:** Graduation from an accredited public or private high school in Texas and enrollment at an approved institution *prior to the end of the 16th month* after high school graduation. The student must not have **attempted** more than 30 semester credit hours (SCHs) (excluding credits for dual enrollment or by examination); **OR**
 - **Associate Degree Pathway:** Enrollment in an eligible institution *prior to the end of the 12th month* after the calendar month in which the student earned an associate degree from a public or private nonprofit Texas institution of higher education; **OR**
 - **Honorable Military Discharge Pathway:** Enrollment in an eligible institution of higher education *within 12 months* after being honorably discharged from military service. Enlistment in the military must have occurred within 12 months after graduation from an accredited public or private high school in Texas on May 1, 2013 or later. The student must not have **attempted** more than 30 semester credit hours (SCHs) (excluding credits for dual enrollment or by examination); **OR**
 - **TEOG Transfer Pathway:** Completion of at least 24 SCHs with a minimum 2.5 GPA after receiving an IY Texas Educational Opportunity Grant (TEOG) in Fall 2014 or later and transferring to an eligible institution with a minimum 2.5 GPA.
- ✓ Not have been convicted of a felony or crime involving a controlled substance or under the law of any jurisdiction involving a controlled substance as defined by [Chapter 481, Health and Safety Code](#) (Texas Controlled Substances Act)

ADDITIONAL INFORMATION

HIGH SCHOOL RECIPIENT

Home-schooled students are not eligible for an initial award through the **High School Graduation Pathway**. Only students who graduated from an accredited public or private high school in Texas are eligible for consideration as an initial TEXAS Grant applicant.

PRIVATE HIGH SCHOOL CERTIFICATION

To determine eligibility for a student who graduated from a private high school in Texas, the institution of higher education must receive a certification form from the accredited private high school. This form verifies that the student completed the equivalent of the required high school curriculum. The [private high school certification form](#) is located on the THECB's website.

HIGH SCHOOL TRANSCRIPTS

A student who is eligible through either the **Associate Degree** or **TEOG Transfer Pathway** does not need to have his or her high school transcript evaluated.

A student who is eligible through the **High School** or **Military Pathway** must have his or her high school transcript evaluated to determine if certain components of the pathway have been met.

ALERT: Priority Expected Family Contribution (EFC)

The **priority EFC** set by the THECB should serve as a method for prioritizing initial year awards for eligible students and is not an eligibility requirement to receive an award. The calculated priority EFC for 2020-21 is **\$6,047**.

RENEWAL ELIGIBILITY REQUIREMENTS

TO RECEIVE AN RY AWARD, A STUDENT MUST:

- ✓ Be classified by the institution as a Texas resident
- ✓ Be registered with Selective Service, or be exempt
- ✓ Have financial need
- ✓ Be enrolled at least 3/4 time
- ✓ Maintain satisfactory academic progress
- ✓ Not have earned a baccalaureate degree
- ✓ Be a prior recipient of a TEXAS Grant award who is an undergraduate enrolled at a public institution and who qualifies through one of the following three pathways:
 - Is enrolled as an undergraduate at a public 2-year institution and previously received a TEXAS Grant IY award **prior** to fall 2014 at a public 2-year institution; **OR**
 - Is enrolled as an undergraduate in a baccalaureate program at a public 4-year institution or HRI and previously received a TEXAS Grant IY award **prior** to fall 2014 at a public 2-year institution, 4-year public institution, or HRI; **OR**
 - Is enrolled as an undergraduate in a baccalaureate program at a public 4-year institution or HRI and received a TEXAS Grant IY award in fall 2014 or later.
- ✓ Not have been convicted of a felony or crime involving a controlled substance or under the law of any jurisdiction involving a controlled substance as defined by [Chapter 481, Health and Safety Code](#) (Texas Controlled Substances Act)

CONTROLLED SUBSTANCE RESTRICTIONS

Institutions are required to collect a controlled substance statement (electronic or paper) from each TEXAS Grant recipient to confirm eligibility prior to the disbursement of funds. This statement must be retained with the student's records at the institution and be made available if requested in the course of a program review or audit. Each statement must be retained for 7 years after the student's completion of the award period (see [TAC, Section 22.4\(a\)\(2\)\(A\)](#)).

The institution has the flexibility to determine the wording of the statement and the frequency with which it is collected. A **sample** statement is provided below:

Statement of Student Eligibility

Have you ever been convicted of a felony or an offense under Chapter 481, Health and Safety Code (Texas Controlled Substances Act), or under the law of another jurisdiction involving a controlled substance as defined by Chapter 481, Health and Safety Code?

_____ Yes* _____ No**

* If your answer is yes, contact the financial aid office to determine your eligibility to receive a TEXAS Grant.
** If your answer is no, it is your responsibility to inform the financial aid office if this status changes at any time while attending the institution.

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

Student Signature _____ Date _____

A student is not eligible to receive a TEXAS Grant award if convicted of a felony or an offense under the law in any jurisdiction involving a controlled substance as defined in [Chapter 481, Health and Safety Code](#) (Texas Controlled Substances Act), unless he or she meets **all** other eligibility requirements and **one** of the following conditions exists:

- A certificate of discharge by the Texas Department of Criminal Justice or a correctional facility has been issued or the student has completed a period of probation ordered by a court, and at least two years have elapsed from the date of receipt of discharge or completion of probation; **or**
- The student has been pardoned or the record of the offense has been expunged from the student's record and therefore the student has been released from the resulting ineligibility to receive a TEXAS Grant.

NOTE: Institutions should consult with their legal counsel concerning questions about individual cases.

DISCONTINUATION OF ELIGIBILITY

Unless an extension of eligibility (due to a hardship circumstance) is granted, a student’s eligibility ends if any of the following maximums have been met, or the student earns a baccalaureate degree, whichever comes first.

PATHWAY	IF ENROLLED IN A DEGREE PLAN OF 4 YEARS OR LESS	IF ENROLLED IN A DEGREE PLAN OF MORE THAN 4 YEARS	ATTEMPTED HOURS**	HOURS WHILE RECEIVING GRANT FUNDS
INITIAL RECIPIENT BY: <ul style="list-style-type: none"> ASSOCIATE DEGREE 	3 years from the first semester awarded	4 years from the first semester awarded	150 SCH	90 SCH No hardship allowed
INITIAL RECIPIENT BY: <ul style="list-style-type: none"> HIGH SCHOOL GRADUATE TEOG TRANSFER MILITARY DISCHARGE 	5 years from the first semester awarded	6 years from the first semester awarded	150 SCH	150 SCH No hardship allowed

****Attempted hours** is defined as every course in every semester for which a student has been registered as of the official census date. This includes, but is not limited to, repeated courses, courses the student drops, or those from which the student withdraws. Transfer hours and hours for optional internship and cooperative education courses are included if they are accepted by the receiving institution as counting toward the student’s current program of study.

HARDSHIP PROVISIONS

A student who is ineligible for a TEXAS Grant based on the requirements for the grade point average (GPA), number of completed hours, or total hours enrolled may be deemed eligible under a hardship provision. Each institution must adopt a hardship policy and have the policy available for public review. All hardship decisions must be documented in the student’s record and be available for submission to the THECB, upon request.

 **STOP:** A prorated award may be issued to a student who is enrolled in six to eight hours in the last two semesters of his or her degree program. However, no student enrolled for fewer than six hours may receive a TEXAS Grant award, regardless of the circumstances, including graduation.

SATISFACTORY ACADEMIC PROGRESS (SAP)

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

At the end of the second academic year, and all subsequent years, a student must have completed 24 SCHs and have a minimum 2.5 cumulative GPA or its equivalent.

The chart below reflects these requirements, which must be monitored to ensure compliance:

ACADEMIC YEAR	SAP REQUIREMENTS	
END OF 1ST ACADEMIC YEAR	Institution SAP policy	
END OF 2ND ACADEMIC YEAR AND ALL SUBSEQUENT YEARS	Complete 24 SCH in the most recent academic year	2.5 cumulative GPA on a 4-point scale or its equivalent

STOP: Summer Satisfactory Academic Progress (SAP) 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 (SAP).

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.

ADDITIONAL INFORMATION

FIRST YEAR APPEALS

If a student completes the first year on academic warning, probation, or on an approved plan, the student can be considered meeting SAP if the institution's policy includes such provisions. However, at the end of the second year, the student **must** meet the program SAP requirements for continued eligibility unless deemed eligible by the institution under a hardship provision.

GPA REQUIREMENT

A student who does not meet the GPA requirement at the end of the academic year may appeal to have courses taken at other institutions included in the GPA calculation. In this case, all grade points previously earned must be included in the overall GPA calculation. If the resulting GPA meets or exceeds the program's academic progress requirement, an otherwise eligible student may receive an award in the following term.

FAILING COURSES

The intent of the 24 SCH requirement is to encourage timely progression toward a degree. Since a grade of **F** is not earned toward a degree, it should not be considered when calculating the student's completed hours.



SELECTIVE SERVICE STATEMENT

Male students must be registered with or exempt from Selective Service (SS) in order to be eligible to receive federal or state financial assistance. In accordance with [TEC, Section 51.9095](#), male students must file the required **Selective Service Statement of Registration Status** (found below) with their institution or other entity granting or guaranteeing financial assistance. This includes grants, scholarships, loans, or other assistance funded by state revenue, including federal funds or gifts and grants accepted by the state.

When is the statement NOT Required?

- **When the SS registration is confirmed through the Institutional Student Information Record (ISIR):** The ISIR confirmation serves as the student’s official, signed statement because the Department of Education validates registration directly with the Selective Service System (SSS).
- **NEW** **When the SS registration is confirmed through the [SSS.gov website](#):** The institution can save the confirmation directly from the website to serve as the student’s official, signed statement on record.
- **NEW** **When the ISIR confirms that a student is under the age of 18:** No statement or documentation is needed for the applicable award year, even if the student turns 18 during that year.

When is the statement REQUIRED, including all supporting documentation?

- When the student completes a Free Application for Federal Student Aid (FAFSA) but is flagged “not registered” on the ISIR and SS status **cannot** be confirmed on the [SSS.gov website](#).
- **NEW** **When the student completes a Texas Application for State Financial Aid (TASFA):** The required statement is embedded in the 2020-21 TASFA and must be completed by the student.
- **NEW** **When the student does not complete a FAFSA or TASFA but applies for state financial aid, such as through exemptions or waivers, and SS status cannot** be confirmed on the [SSS.gov website](#).

Institutions may collect the required status statement and documentation either electronically or on paper.

[\(English Statement or Spanish Statement\)](#)

SELECTIVE SERVICE STATEMENT OF REGISTRATION STATUS	
Male students must verify their current Selective Service registration status by marking one of the statements below and providing proof of their registration status to their current institution. Failure to do so may result in the loss of eligibility for state financial aid.	
_____ I am under the age of 18 and not currently required to register.	
_____ I am REGISTERED with the Selective Service and, <i>Check the following box that applies:</i> <input type="checkbox"/> I have already submitted proof of registration to my current institution. <input type="checkbox"/> Proof of registration is included with this statement. <input type="checkbox"/> I will submit proof of my registration. NOTE: Proof is required to be considered eligible for financial aid.	_____ I am EXEMPT from registration and, <i>Check the following box that applies:</i> <input type="checkbox"/> I have already submitted proof of my exemption to my current institution. <input type="checkbox"/> Proof of my exemption is included with this statement. <input type="checkbox"/> I will submit proof of my exemption. NOTE: Proof is required to be considered eligible for financial aid.
_____ I am over the age of 18. I am not registered with Selective Service and I am not exempt from registration with Selective Service.	
I, _____, hereby certify that the Selective Service status statement provided above is true and accurate.	
Student ID: _____	Signature: _____ Date: _____

ADDITIONAL INFORMATION

FREQUENCY COLLECTING THE STATEMENT

If the student’s status will NOT change, the statement and supporting documentation can be used for subsequent semesters. (Example: The student entered the U.S. after the eligible age to register.)

If the student’s status is temporary, the statement must be collected each academic year until the student is registered or determined exempt. (Example: Student is under age 18 but did not complete a FAFSA or TASFA.)

RETENTION SCHEDULE

The status statement and all documentation must be retained in the student’s record for 7 years after the date of completion of the award period ([TEC, Section 441.1855](#)).

REPROCESSED ISIRS

If the student’s most recent ISIR transaction has been reprocessed by the Central Processing System (CPS) and the registration with the SSS was confirmed, the institution does not need to collect the status statement or any documentation.



AWARDING

When awarding RY students:

- Precedence goes to RY students over IY students if allocated funds are insufficient to award all eligible students.

When awarding IY students:

- Precedence goes to eligible applicants meeting the **Priority EFC**.
 - o Of eligible applicants meeting the **Priority EFC**, greatest precedence goes to those meeting the **Priority Model** academic criteria ([TEC, Section 56.303\(f\)](#)) beginning with the lowest expected family contribution ([TEC, Section 56.303\(e\)](#)).
 - o Of the remaining eligible applicants that do not meet the **Priority Model** but meet the **Priority EFC**, precedence goes to those who demonstrate the greatest financial need, defined as cost of attendance minus the calculated EFC ([TAC, Section 22.226\(15\)](#)).

The **Priority Deadline** ([TEC, Section 56.008](#)) is used as an additional determining factor for otherwise similarly situated applicants.

Example 1: Two IY students meet both the **Priority EFC** and the **Priority Model** criteria. *These two applicants are similarly situated.*

- The student who meets the **Priority Deadline** would be given priority consideration over the student who does not meet the **Priority Deadline**.

Example 2: One IY student meets the **Priority EFC** and the **Priority Model** criteria but does not meet the **Priority Deadline**. A second IY student meets the **Priority Deadline** and the **Priority Model** criteria but does *not* meet the **Priority EFC**. *These two applicants are not similarly situated.*

- The first student has met the two legislative priorities for IY TEXAS Grants and would thus take precedence over the student who does not meet the Priority EFC.

SEMESTER MAXIMUM

Students receiving a TEXAS Grant cannot exceed the **semester** maximum. Students may be issued a total of 3 awards (Fall, Spring, and Summer) in an academic year.

- The award maximum is \$5,039 per semester.
- A student could receive up to \$15,117 for the 2020-21 award year.
- Target awards are still encouraged (\$2,500 per semester = up to \$7,500).

2020-21 AWARD MAXIMUMS				
INSTITUTION TYPE	YEAR MAX	SEMESTER MAX	TARGET YEAR MAX	TARGET SEMESTER MAX
PUBLIC UNIVERSITIES, HRIs	\$15,117	\$5,039	\$7,500	\$2,500

PRIORITY AWARD MODEL REQUIREMENTS

To receive priority consideration for an IY award through the TEXAS Grant program, an eligible student must meet at least **one** high school graduation requirement in **at least two** of the following **four** areas:

AREA	HIGH SCHOOL GRADUATION REQUIREMENTS
ADVANCED ACADEMIC PROGRAM	<ul style="list-style-type: none"> • 12 hours of college credit (dual credit or AP courses) • Complete the equivalent of the Recommended or Advanced High School Program* • Complete the International Baccalaureate (IB) Program
TSI READINESS	<ul style="list-style-type: none"> • Meet the Texas Success Initiatives (TSI) assessment thresholds or qualify for an exemption
CLASS STANDING	<ul style="list-style-type: none"> • Graduate in the top 1/3 of the HS graduating class • Graduate with a GPA of at least 3.0 on a 4-point scale or the equivalent
ADVANCED MATH	<ul style="list-style-type: none"> • Complete at least one math course beyond Algebra II • Complete at least one advanced career and technical or technical applications course, as determined by the Texas Education Agency (TEA)
<p>*For additional information on high school graduation requirements, visit the Texas Education Agency website or contact TEA's Curriculum Standards and Student Support Division at curriculum@tea.texas.gov.</p> <p>Resource: Graduation Programs Side by Side</p>	

REQUIRED MATCHING

Institutions are required to cover any tuition and required fees that are not covered by the amount of the TEXAS Grant using other non-loan funds from federal, state, institutional, or outside sources. Funds used for this purpose are frequently referred to as "matching funds."

⚠️ ALERT: A **Required Fee**, for the purpose of administering the TEXAS Grant Program, includes mandatory fees (required by statute) or discretionary fees (authorized by statute, imposed by the governing board of an institution) and fees that an institution charges to a student as a condition of enrollment at the institution or in a specific course.

PRORATION

Award amounts must be prorated under the following circumstances:

- Student is enrolled less than 3/4 time but at least 1/2 time, with an extension of eligibility (due to a hardship circumstance).

HARDSHIP PRORATION SCHEDULE	Divide the maximum award for the semester by 12 and multiply by the number of hours enrolled (6-8 hours)
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- The balance of either total attempted hours **or** eligible program hours while receiving grant funds is less than the total number of hours the student is enrolled.

BALANCE OF TOTAL ATTEMPTED HOURS (150 SCH)	Balance of hours = 6-8 hours: 50% of the maximum award Balance of hours = 1-5 hours: 25% of the maximum award
BALANCE OF ELIGIBLE PROGRAM HOURS (150 OR 90 SCH)	

Example: A student has 147 hours and 3 eligible hours remaining. The 3 hours would be prorated using the chart above.

AWARD ADJUSTMENTS

Institutions may be required to make award adjustments in the following circumstances (see ^{NEW}[19 TAC, Section 22.11](#)):

- Student officially withdraws from enrollment.
 - The institution will use the general refund policy to determine the amount of financial aid to be reduced.
 - A refund is not owed to the program if a student drops or withdraws after the end of an institution's refund period.
- Student's disbursement exceeds his/her eligibility amount.
 - Recalculate eligibility amount.

NOTE: If funds are available after an award has been adjusted, they can be re-awarded to other eligible students at the institution. If the funds cannot be re-awarded, they must be returned to the THECB based on the [Timely Distribution of Funds](#).

OVER AWARDS

If an award has been disbursed and a student receives other assistance that exceeds the student's financial need, the institution is **not** required to adjust the award unless the sum of the excess resources is greater than \$300 (see ^{NEW}[19 TAC, Section 22.11\(d\)](#)).

PROCESSING FUNDS

REQUESTING AND RETURNING PROGRAM FUNDS

Institutions must submit a form online through the [Grant Payment System](#) software application (app) to request or return funds. The app can be accessed through the secure Coordinating Board Pass System (CBPass) portal on the Student Financial Aid Programs (SFAP) Information Webpage.

- **Requesting Funds:** The institutions can begin submitting requests for funding on **August 3, 2020**. The THECB will begin processing funds *after* **September 1, 2020**. Institutions have *until* the close of business on **August 1, 2021** (or the first working day thereafter if it falls on a weekend or holiday) to request program funds.
- **Returning Funds:** Institutions that submit a return of funds through the Grant Payment System should use the [Electronic Funds Transfer](#) process.

NOTE: Each biennium (the two-year state budget period), funds not requested in the first year can be carried forward 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.

TIMELY DISTRIBUTION OF FUNDS

Institutions **must** follow these requirements when processing program funds (see [19 TAC, Section 22.2](#)):

- Institutions have **3** business days after receiving the funds to apply the funds to a student's account.
- Institutions have **6** business days after receiving the funds to return undisbursed funds.
- Institutions have **45** calendar days from the date a student becomes ineligible to return disbursed funds.
- Institutions have **120** calendar days to return funds after a student has notified the institution of a decision to cancel the award.

LATE DISBURSEMENTS

Funds that are disbursed after the end of a student's period of enrollment must only be used to pay the student's outstanding balance for the period of enrollment, or to make a payment on an outstanding loan received during that period of enrollment. The institution is required to document the reason for a student's late disbursement. All late disbursements must be processed prior to the end of the state's fiscal year, unless granted an extension by the THECB. Under no circumstances should funds be released directly to the student in this situation (see ^{NEW}[19 TAC, Section 22.11\(g\)](#)).

AUTHORITY TO TRANSFER FUNDS

Institutions participating in a combination of TCWS, TEXAS Grant, TEOG, and TEG may transfer up to 10 percent of the institution's total annual program allocation or **\$20,000** (whichever is less) between programs within the relevant fiscal year. Transfer requests are submitted online through [CONTACT US](#) (select "Financial Aid Question" under Contact Reason). Institutions requesting a transfer of funds must submit a request by **July 1, 2021**. The Financial Aid Services staff will respond to the institution to provide next steps for the process.



TEXAS EDUCATIONAL OPPORTUNITY GRANT

The Texas Higher Education Coordinating Board (THECB) Program Guidelines are intended to support institutions by highlighting requirements that appear in the Texas Education Code (TEC) and Title 19 of the Texas Administrative Code (TAC). When administering this program, institutions should always refer to the applicable statutes and rules.

The information provided in this document is to be used solely as a resource and does not supersede the statute and/or rules for this program.

PROGRAM AUTHORITY AND PURPOSE

The Texas Educational Opportunity Grant (TEOG) Program is authorized by [TEC, Chapter 56, Section 56.402](#). Rules establishing procedures to administer the program can be found in [Title 19 of the TAC, Chapter 22, Subchapter M](#). The program is funded by appropriations authorized by the Texas Legislature. The purpose of the TEOG Program is to provide financial assistance to eligible students attending Texas two-year public institutions of higher education.

STATE PRIORITY DEADLINE [\(TEC, SECTION 56.008](#) and [19 TAC, SECTION 22.6](#))

The THECB provides a uniform priority deadline for applications that qualify for state-funded financial assistance in an academic year. General Academic Teaching Institutions (GATIs) in Texas (*including* Lamar State College-Orange and Lamar State College-Port Arthur), as defined in [TEC, Section 61.003\(3\)](#), must publicize and use **January 15** as the state priority deadline for identifying eligible students to be given priority in receiving awards through the state financial aid programs. Institutions may define how their students must meet the priority deadline and are encouraged to adopt a policy describing the actions that students must take to meet the deadline.

ELIGIBLE INSTITUTIONS

Community colleges, public state colleges, and public technical institutes, as defined in [TEC, Section 61.003](#) are eligible to make initial year (IY) and renewal year (RY) awards. Each eligible institution will have a single allocation each fiscal year to make both IY and RY awards.

ELIGIBILITY

ELIGIBILITY REQUIREMENTS

TO RECEIVE AN IY AWARD, A STUDENT MUST:	TO RECEIVE AN RY AWARD, A STUDENT MUST:
<ul style="list-style-type: none"> ✓ Be classified by the institution as a Texas resident ✓ Be registered with Selective Service, or be exempt ✓ Have applied for any available financial aid assistance ✓ Have financial need ✓ Be enrolled at least 1/2 time as an undergraduate student in an associate degree or certificate program at a 2-year institution ✓ Not have attempted more than 30 semester credit hours (SCH) (excluding credits for dual enrollment or by examination) ✓ Not have earned an associate or baccalaureate degree ✓ Not be concurrently receiving TEXAS Grant ✓ Not have been convicted of a felony or crime involving a controlled substance or under the law of any jurisdiction involving a controlled substance as defined by Chapter 481, Health and Safety Code (Texas Controlled Substances Act) 	<ul style="list-style-type: none"> ✓ Be classified by the institution as a Texas resident ✓ Be registered with Selective Service, or be exempt ✓ Be a previous TEOG initial award recipient ✓ Have financial need ✓ Be enrolled at least 1/2 time as an undergraduate student in an associate degree or certificate program at a 2-year institution ✓ Maintain satisfactory academic progress ✓ Not have earned an associate or baccalaureate degree ✓ Not be concurrently receiving TEXAS Grant ✓ Not have been convicted of a felony or crime involving a controlled substance or under the law of any jurisdiction involving a controlled substance as defined by Chapter 481, Health and Safety Code (Texas Controlled Substances Act)

ADDITIONAL INFORMATION

TEOG AND TEXAS GRANT IN THE SAME AWARD YEAR

A student may receive a TEOG and TEXAS Grant award during the same award year if both awards are not received for the same semester or term.

Example:

Student attends a public university in the fall and receives a TEXAS grant award but transfers to a public community college in the spring. A TEOG can be awarded for the spring semester if the student meets the eligibility requirements.

GED

A student who received a GED can be considered eligible for a TEOG if the student is admitted for enrollment as an entering student in the first 30 attempted SCHs of an associate degree or certificate program.

ALERT: Priority Expected Family Contribution (EFC)

The **priority EFC** set by the THECB should serve as a method for prioritizing initial year awards for eligible students and is not an eligibility requirement to receive an award. The calculated priority EFC for 2020-21 is **\$6,047**.

CONTROLLED SUBSTANCE RESTRICTIONS

Institutions are required to collect a controlled substance statement (electronic or paper) from each TEOG recipient to confirm eligibility prior to the disbursement of funds. This statement must be retained with the student’s records at the institution and be made available if requested in the course of a program review or audit. Each statement must be retained for 7 years after the student’s completion of the award period (see [TAC, Section 22.4\(a\)\(2\)\(A\)](#)).

The institution has the flexibility to determine the wording of the statement and the frequency with which it is collected. A **sample** statement is provided below:

Statement of Student Eligibility

Have you ever been convicted of a felony or an offense under Chapter 481, Health and Safety Code (Texas Controlled Substances Act), or under the law of another jurisdiction involving a controlled substance as defined by Chapter 481, Health and Safety Code?

_____ Yes* _____ No**

* If your answer is yes, contact the financial aid office to determine your eligibility to receive a TEOG.
** If your answer is no, it is your responsibility to inform the financial aid office if this status changes at any time while attending the institution.

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

Student Signature _____ Date _____

A student is not eligible to receive a TEOG award if convicted of a felony or an offense under the law in any jurisdiction involving a controlled substance as defined in [Chapter 481, Health and Safety Code](#) (Texas Controlled Substances Act), unless he or she meets **all** other eligibility requirements and **one** of the following conditions exists:

- A certificate of discharge by the Texas Department of Criminal Justice or a correctional facility has been issued or the student completed a period of probation ordered by a court, and at least two years have elapsed from the date of receipt of discharge or completion of probation; **or**
- The student has been pardoned or the record of the offense has been expunged from the student’s record and therefore the student has been released from the resulting ineligibility to receive a TEOG.

NOTE: Institutions should consult with their legal counsel concerning questions about individual cases.

DISCONTINUATION OF ELIGIBILITY

Unless an extension of eligibility (due to a hardship circumstance) is granted, a student’s eligibility ends if any of the following maximums have been met, or the student earns an associate degree, whichever comes first.

TIME LIMIT	ATTEMPTED HOURS**	HOURS WHILE RECEIVING GRANT FUNDS
4 years from the first semester awarded	75 SCH	75 SCH No hardship allowed

****Attempted hours** is defined as every course in every semester for which a student has been registered as of the official census date. This includes, but is not limited to, repeated courses, courses the student drops, or those from which the student withdraws. For transfer students, the transfer hours and hours for optional internship and cooperative education courses are included if they are accepted by the receiving institution toward the student’s current program of study.

HARDSHIP PROVISIONS

A student who is ineligible for a TEOG award based on grade point average (GPA), completion rate for satisfactory academic progress, or enrollment less than half-time (due to an unforeseen circumstance) may be deemed eligible under a hardship provision. Each institution must adopt a hardship policy and have the policy available for public review. All hardship decisions must be documented in the student’s record and be available for submission to the THECB, upon request.

SATISFACTORY ACADEMIC PROGRESS (SAP)

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

At the end of the second academic year, and all subsequent years, a student must have completed 75 percent of total attempted hours and have a minimum 2.5 cumulative GPA or its equivalent.

The chart below reflects these requirements, which must be monitored to ensure compliance.

ACADEMIC YEAR	SAP REQUIREMENTS	
END OF 1ST ACADEMIC YEAR	Institutional SAP policy	
END OF 2ND ACADEMIC YEAR AND ALL SUBSEQUENT YEARS	Complete 75% of attempted SCH in the most recent academic year	2.5 cumulative GPA on a 4-point scale or its equivalent

STOP: Summer Satisfactory Academic Progress (SAP) 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 (SAP).

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.

ADDITIONAL INFORMATION

MAXIMUM HOURS OF ELIGIBILITY

While a hardship exception may be granted to allow an award in excess of 75 attempted semester credit hours (SCH), the total number of hours *paid for* with TEOG funds cannot exceed 75 SCH.

FIRST YEAR APPEALS

If a student completes the first year on academic warning, probation, or on an approved plan, the student can be considered meeting SAP if the institution’s policy includes such provisions. However, at the end of the second year, the student must meet the program SAP requirements for continued eligibility, unless deemed eligible by the institution under a hardship provision.

GPA REQUIREMENT

A student who does not meet the GPA requirement at the end of the academic year may appeal to have courses taken at other institutions included in the GPA calculation. In this case, all grade points previously earned must be included in the overall GPA calculation. If the resulting GPA meets or exceeds the program’s academic progress requirement, an otherwise eligible student may receive an award in the following term.



SELECTIVE SERVICE STATEMENT

Male students must be registered with or exempt from Selective Service (SS) in order to be eligible to receive federal or state financial assistance. In accordance with [TEC, Section 51.9095](#), male students must file the required **Selective Service Statement of Registration Status** (found below) with their institution or other entity granting or guaranteeing financial assistance. This includes grants, scholarships, loans, or other assistance funded by state revenue, including federal funds or gifts and grants accepted by the state.

When is the statement NOT Required?

- **When the SS registration is confirmed through the Institutional Student Information Record (ISIR):** The ISIR confirmation serves as the student’s official, signed statement because the Department of Education validates registration directly with the Selective Service System (SSS).
- **NEW** **When the SS registration is confirmed through the [SSS.gov website](#):** The institution can save the confirmation directly from the website to serve as the student’s official, signed statement on record.
- **NEW** **When the ISIR confirms that a student is under the age of 18:** No statement or documentation is needed for the applicable award year, even if the student turns 18 during that year.

When is the statement REQUIRED, including all supporting documentation?

- When the student completes a Free Application for Federal Student Aid (FAFSA) but is flagged “not registered” on the ISIR and SS status **cannot** be confirmed on the [SSS.gov website](#).
- **NEW** **When the student completes a Texas Application for State Financial Aid (TASFA):** The required statement is embedded in the 2020-21 TASFA and must be completed by the student.
- **NEW** When the student does not complete a FAFSA or TASFA but applies for state financial aid, such as through exemptions or waivers, and SS status **cannot** be confirmed on the [SSS.gov website](#).

ADDITIONAL INFORMATION

FREQUENCY COLLECTING THE STATEMENT

If the student’s status will NOT change, the statement and supporting documentation can be used for subsequent semesters. (Example: The student entered the U.S. after the eligible age to register.)

If the student’s status is temporary, the statement must be collected each academic year until the student is registered or determined exempt. (Example: Student is under age 18 but did not complete a FAFSA or TASFA.)

RETENTION SCHEDULE

The status statement and all documentation must be retained in the student’s record for 7 years after the date of completion of the award period ([TEC, Section 441.1855](#)).

REPROCESSED ISIRS

If the student’s most recent ISIR transaction has been reprocessed by the Central Processing System (CPS) and the registration with the SSS was confirmed, the institution does not need to collect the status statement or any documentation.

Institutions may collect the required status statement and documentation either electronically or on paper.

([English Statement](#) or [Spanish Statement](#))

SELECTIVE SERVICE STATEMENT OF REGISTRATION STATUS	
Male students must verify their current Selective Service registration status by marking one of the statements below and providing proof of their registration status to their current institution. Failure to do so may result in the loss of eligibility for state financial aid.	
<input type="checkbox"/> I am under the age of 18 and not currently required to register.	
<input type="checkbox"/> I am REGISTERED with the Selective Service and, <i>Check the following box that applies:</i> <input type="checkbox"/> I have already submitted proof of registration to my current institution. <input type="checkbox"/> Proof of registration is included with this statement. <input type="checkbox"/> I will submit proof of my registration. NOTE: Proof is required to be considered eligible for financial aid.	<input type="checkbox"/> I am EXEMPT from registration and, <i>Check the following box that applies:</i> <input type="checkbox"/> I have already submitted proof of my exemption to my current institution. <input type="checkbox"/> Proof of my exemption is included with this statement. <input type="checkbox"/> I will submit proof of my exemption. NOTE: Proof is required to be considered eligible for financial aid.
<input type="checkbox"/> I am over the age of 18. I am not registered with Selective Service and I am not exempt from registration with Selective Service.	
I, _____, hereby certify that the Selective Service status statement provided above is true and accurate.	
Student ID: _____	Signature: _____
Date: _____	

AWARDING

If allocated funds are insufficient to allow awards to all eligible students, priority must be given to students who are eligible for an RY award.

In determining who should receive an IY TEOG award, an institution must give highest priority to students who demonstrate the greatest financial need at the time the award is made.

SEMESTER MAXIMUM

Students receiving a TEOG cannot exceed the **semester** maximum. Students may be issued a total of 3 awards (Fall, Spring, and Summer) in an academic year.

- Awards for each semester are still based on the student’s enrollment status at census.

2020-21 AWARD MAXIMUMS					
INSTITUTION TYPE	AWARD MAXIMUM PER YEAR	SEMESTER MAXIMUM BASED ON ENROLLMENT ON CENSUS DATE			
		FULL-TIME	3/4 TIME	1/2 TIME	< 1/2 TIME
PUBLIC STATE COLLEGES	\$5,961	\$1,987	\$1,490	\$994	\$0
PUBLIC TECHNICAL INSTITUTES	\$8,601	\$2,867	\$2,150	\$1,434	\$0
PUBLIC COMMUNITY COLLEGES	\$4,965	\$1,655	\$1,241	\$828	\$0

REQUIRED MATCHING

Institutions are required to cover the cost of tuition and required fees that exceed the TEOG award amount using other non-loan funds from federal (excluding Pell grants), state, institutional, or outside sources. Funds used for this purpose are frequently referred to as “matching funds.”

⚠️ ALERT: A **Required Fee**, for the purpose of administering the TEOG Program, includes mandatory fees (required by statute) or discretionary fees (authorized by statute, imposed by the governing board of an institution) and fees that an institution charges to a student as a condition of enrollment at the institution or in a specific course.

NOTE: Institutions are required to match funds for all TEOG recipients, regardless if the student is charged in-district or out-of-district tuition and fees.

PRORATION

All TEOG award amounts must be prorated in relation to the student’s enrollment status as of the census date of a regular semester.

Award amounts must also be prorated in one of the following situations:

- Student is enrolled less than half-time with an extension of eligibility (due to a hardship circumstance).

HARDSHIP PRORATION SCHEDULE	ENROLLED < 6 HOURS

- The balance of eligible hours is less than the number of hours taken in the given term or semester:

BALANCE OF TOTAL ATTEMPTED HOURS	Balance = 9-11 hours: 75% of max award
	Balance = 6-8 hours: 50% of the max award
BALANCE OF ELIGIBLE PROGRAM HOURS	Balance = 1-5 hours: 25% of the max award

AWARD ADJUSTMENTS

Institutions may be required to make award adjustments in the following circumstances (see ^{NEW}[19 TAC, Section 22.11](#)):

- Student officially withdraws from enrollment.
 - The institution will use the general refund policy to determine the amount of financial aid to be reduced.
 - A refund is not owed to the program if a student drops or withdraws after the end of an institution’s refund period.
- Student’s disbursement exceeds his/her eligibility amount.
 - Recalculate eligibility amount.

NOTE: If funds are available after an award has been adjusted, they can be re-awarded to other eligible students at the institution. If the funds cannot be re-awarded, they must be returned to the THECB based on the [Timely Distribution of Funds](#).

OVER AWARDS

If an award has been disbursed and a student receives other assistance that exceeds the student’s financial need, the institution is **not** required to adjust the award unless the sum of the excess resources is greater than \$300 (see ^{NEW}[19 TAC, Section 22.11\(d\)](#)).

ADDITIONAL INFORMATION

PRORATING AN AWARD

Listed below are 2 examples of how to calculate a prorated TEOG award.

Example One:

Student A is enrolled in 5 SCHs for the fall semester at ABC Community College and has an extension of eligibility due to an undue hardship circumstance. The prorated award should be calculated as:

- $\$1,655/12 = \138
- $\$138 \times 5 = \690

The prorated award for Student A = \$690

Example Two:

Student B is enrolled in 12 SCHs for the fall semester at XYZ State College but has only 8 SCHs of TEOG eligibility left. The prorated award should be calculated as:

- Maximum award for the semester = \$1,987
- $\$1,987 \times 50\% = \994

The prorated award for Student B = \$994

PROCESSING FUNDS

REQUESTING AND RETURNING PROGRAM FUNDS

Institutions must submit a form online through the [Grant Payment System](#) software application (app) to request or return funds. The app can be accessed through the secure Coordinating Board Pass System (CBPass) portal on the Student Financial Aid Programs (SFAP) Information Webpage.

- **Requesting Funds:** Institutions can begin submitting requests for funding on **August 3, 2020**. The THECB will begin processing funds *after* **September 1, 2020**. Institutions have *until* the close of business on **August 1, 2021** (or the first working day thereafter if it falls on a weekend or holiday) to request program funds.
- **Returning Funds:** Institutions that submit a return of funds through the Grant Payment System should use the [Electronic Funds Transfer](#) process.

NOTE: Each biennium (the two-year state budget period), funds not requested in the first year can be carried forward 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.

TIMELY DISTRIBUTION OF FUNDS

Institutions **must** follow these requirements when processing program funds (see [19 TAC, Section 22.2](#)):

- Institutions have **3** business days after receiving the funds to apply the funds to a student's account.
- Institutions have **6** business days after receiving the funds to return undisbursed funds.
- Institutions have **45** calendar days from the date a student becomes ineligible to return disbursed funds.
- Institutions have **120** calendar days to return funds after a student has notified the institution of a decision to cancel the award.

LATE DISBURSEMENTS

Funds that are disbursed after the end of a student's period of enrollment must be used either to pay the student's outstanding balance for the period of enrollment, or to make a payment on an outstanding loan received during that period of enrollment. The institution is required to document the reason for a student's late disbursement. All late disbursements must be processed prior to the end of the state's fiscal year, unless granted an extension by the THECB. Under no circumstances should funds be released directly to the student in this situation (see ^{NEW} [19 TAC, Section 22.11\(g\)](#)).

AUTHORITY TO TRANSFER FUNDS

Institutions participating in a combination of TCWS, TEXAS Grant, TEOG, and TEG may transfer up to 10 percent of the institution's total annual program allocation or **\$20,000** (whichever is less) between programs within the relevant fiscal year. Transfer requests are submitted online through [CONTACT US](#) (select "Financial Aid Question" under Contact Reason). Institutions requesting a transfer of funds must submit a request by **July 1, 2021**. The Financial Aid Services staff will respond to the institution to provide next steps for the process.



TUITION EQUALIZATION GRANT PROGRAM

The Texas Higher Education Coordinating Board (THECB) Program Guidelines are intended to support institutions by highlighting requirements that appear in the Texas Education Code (TEC) and Title 19 of the Texas Administrative Code (TAC). When administering this program, institutions should always refer to the applicable statutes and rules. The information provided in this document is to be used solely as a resource and does not supersede the statute and/or rules for this program.

PROGRAM AUTHORITY AND PURPOSE

The Tuition Equalization Grant (TEG) Program was authorized by [TEC Chapter 61, Section 61.221](#). Rules establishing procedures to administer the subchapter can be found in [Title 19 of the TAC, Chapter 22, Subchapter B](#). The program is funded by appropriations by the Texas Legislature. The purpose of the TEG Program is to promote the best use of existing educational resources and facilities within this state, both public and private, by providing need-based grants to Texas residents attending approved private or independent Texas colleges or universities.

STATE PRIORITY DEADLINE ([TEC, SECTION 56.008](#) AND [19 TAC, SECTION 22.6](#))

The THECB provides a uniform priority deadline for applications that qualify for state-funded financial assistance in an academic year. General Academic Teaching Institutions (GATIs) (*including* Lamar State College-Orange and Lamar State College-Port Arthur) in Texas, as defined in [TEC, Section 61.003\(3\)](#), must publicize and use **January 15** as the state priority deadline for identifying eligible students to be given priority in receiving awards through the state financial aid programs. Institutions may define how their students must meet the priority deadline and are encouraged to adopt a policy describing the actions that students must take to meet the deadline.

ELIGIBLE INSTITUTIONS

Any college or university, defined in [TEC, Section 61.003\(15\)](#) as a private or independent institution of higher education, will have a single allocation in which first and subsequent awards can be made.

ELIGIBILITY

ELIGIBILITY REQUIREMENTS

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 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)
- ✓ Maintain satisfactory academic progress as determined by the institution
- ✓ 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 (SAP)
 - [See SAP section, p. 3](#)

DISCONTINUATION OF ELIGIBILITY

Unless an extension of eligibility (due to a hardship circumstance) is granted, a student's eligibility ends if any of the following maximums have been met:

DEGREE TYPE	IF ENROLLED IN A DEGREE OR CERTIFICATE PROGRAM OF 4 YEARS OR LESS	IF ENROLLED IN A DEGREE OR CERTIFICATE PROGRAM OF MORE THAN 4 YEARS
RECIPIENT WORKING TOWARD AN ASSOCIATE OR BACCALAUREATE DEGREE	5 years from the first semester awarded	6 years from the first semester awarded
RECIPIENT WORKING TOWARD A MASTER'S, PROFESSIONAL, OR DOCTORAL DEGREE	No maximum time limit	

NOTE: An award cannot be granted to a student pursuing a second degree of one already earned.

HARDSHIP PROVISIONS

A student who is ineligible for a TEG award based on grade point average (GPA), completion rate, or number of completed hours for satisfactory academic progress, or enrollment less than three-quarter time may be deemed eligible under a hardship provision. Each institution must adopt a hardship policy and have the policy available for public review. All hardship decisions must be documented in the student's record and be available for submission to the THECB, upon request.

SATISFACTORY ACADEMIC PROGRESS (SAP)

At the end of the first academic year, a student must meet the SAP requirements set by the institution to be eligible for a subsequent 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 they must have a minimum 2.5 cumulative GPA or its equivalent. 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 they must have a minimum 2.5 cumulative GPA or its equivalent.

The chart below reflects requirements, which must be monitored to ensure compliance.

ACADEMIC YEAR	SAP REQUIREMENTS		
END OF 1ST ACADEMIC YEAR	Institutional SAP policy		
END OF 2ND ACADEMIC YEAR OR LATER – UNDERGRADUATE STUDENTS	Completion of at least 24 SCH in the most recent academic year	75% completion rate	2.5 cumulative GPA on a 4-point scale or its equivalent
END OF 2ND ACADEMIC YEAR OR LATER – GRADUATE STUDENTS	Completion of at least 18 SCH in the most recent academic year		

STOP: Summer Satisfactory Academic Progress (SAP) 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 (SAP).

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.

ADDITIONAL INFORMATION

FIRST YEAR APPEALS

If a student completes the first year on academic warning, probation, or on an approved plan, the student can be considered meeting SAP if the institution’s policy includes such provisions. However, at the end of the second year, the student must meet the program SAP requirements for continued eligibility, unless deemed eligible by the institution under a hardship provision.

GPA REQUIREMENT

A student who does not meet the GPA requirement at the end of the academic year may appeal to have courses taken at other institutions included in the GPA calculation. In this case, all grade points previously earned must be included in the overall GPA calculation. If the resulting GPA meets or exceeds the program’s academic progress requirement, an otherwise eligible student may receive an award in the following term.

FAILING COURSES

The intent of the 24/18 SCH requirement is to encourage timely progression toward a degree. Since a grade of **F** is not earned toward a degree, it should not be considered when calculating the student’s completed hours. Failing grades must be considered attempted hours and therefore counted in the calculation of a student’s completion rate.



SELECTIVE SERVICE STATEMENT

Male students must be registered with or exempt from Selective Service (SS) in order to be eligible to receive federal or state financial assistance. In accordance with [TEC, Section 51.9095](#), male students must file the required **Selective Service Statement of Registration Status** (found below) with their institution or other entity granting or guaranteeing financial assistance. This includes grants, scholarships, loans, or other assistance funded by state revenue, including federal funds or gifts and grants accepted by the state.

When is the statement NOT Required?

- **When the SS registration is confirmed through the Institutional Student Information Record (ISIR):** The ISIR confirmation serves as the student’s official, signed statement because the Department of Education validates registration directly with the Selective Service System (SSS).
- **NEW** **When the SS registration is confirmed through the [SSS.gov website](#):** The institution can save the confirmation directly from the website to serve as the student’s official, signed statement on record.
- **NEW** **When the ISIR confirms that a student is under the age of 18:** No statement or documentation is needed for the applicable award year, even if the student turns 18 during that year.

When is the statement REQUIRED, including all supporting documentation?

- When the student completes a Free Application for Federal Student Aid (FAFSA) but is flagged “not registered” on the ISIR and SS status **cannot** be confirmed on the [SSS.gov website](#).
- **NEW** **When the student completes a Texas Application for State Financial Aid (TASFA):** The required statement is embedded in the 2020-21 TASFA and must be completed by the student.
- **NEW** **When the student does not complete a FAFSA or TASFA but applies for state financial aid, such as through exemptions or waivers, and SS status cannot** be confirmed on the [SSS.gov website](#).

ADDITIONAL INFORMATION

FREQUENCY COLLECTING THE STATEMENT
 If the student’s status will NOT change, the statement and supporting documentation can be used for subsequent semesters. (Example: The student entered the U.S. after the eligible age to register.)
 If the student’s status is temporary, the statement must be collected each academic year until the student is registered or determined exempt. (Example: Student is under age 18 but did not complete a FAFSA or TASFA.)

RETENTION SCHEDULE
 The status statement and all documentation must be retained in the student’s record for 7 years after the date of completion of the award period ([TEC, Section 441.1855](#)).

REPROCESSED ISIRS
 If the student’s most recent ISIR transaction has been reprocessed by the Central Processing System (CPS) and the registration with the SSS was confirmed, the institution does not need to collect the status statement or any documentation.

Institutions may collect the required status statement and documentation either electronically or on paper.
 ([English Statement](#) or [Spanish Statement](#))

SELECTIVE SERVICE STATEMENT OF REGISTRATION STATUS <small>Male students must verify their current Selective Service registration status by marking one of the statements below and providing proof of their registration status to their current institution. Failure to do so may result in the loss of eligibility for state financial aid.</small>	
<input type="checkbox"/> I am under the age of 18 and not currently required to register.	
<input type="checkbox"/> I am REGISTERED with the Selective Service and, <small>Check the following box that applies:</small> <input type="checkbox"/> I have already submitted proof of registration to my current institution. <input type="checkbox"/> Proof of registration is included with this statement. <input type="checkbox"/> I will submit proof of my registration. <small>NOTE: Proof is required to be considered eligible for financial aid.</small>	<input type="checkbox"/> I am EXEMPT from registration and, <small>Check the following box that applies:</small> <input type="checkbox"/> I have already submitted proof of my exemption to my current institution. <input type="checkbox"/> Proof of my exemption is included with this statement. <input type="checkbox"/> I will submit proof of my exemption. <small>NOTE: Proof is required to be considered eligible for financial aid.</small>
<input type="checkbox"/> I am over the age of 18. I am not registered with Selective Service and I am not exempt from registration with Selective Service.	
I, _____, hereby certify that the Selective Service status statement provided above is true and accurate.	
Student ID: _____	Signature: _____
	Date: _____

AWARDING

A TEG award amount for a term or semester may not exceed a student’s financial need or tuition differential for that term or semester, or the program maximum for the academic year, whichever is least. Undergraduate students with exceptional financial need may receive up to 150% of the program maximum award. Exceptional financial need is defined as the need an undergraduate student has if his or her expected family contribution (EFC) is less than or equal to \$1,000.



STOP: Enrollment in Programs Related to Religious Ministry

Any enrollment in a religious ministry degree program, whether the program is the student’s sole major, an additional major, or a minor, makes the student **ineligible** for a TEG award. If a TEG recipient adds a religious ministry major or minor, there is no uniform method or procedure available that gives institutions the capability to separate funds for an eligible program versus a religious ministry program. The institution must determine when the new program was added and either return TEG funds to the THECB or follow the procedure for timely distribution of funds for ineligible aid.

ANNUAL MAXIMUM

Students receiving a TEG cannot exceed the **annual** maximum.

- A student may receive up to the annual maximum amount of \$3,420. (Undergraduates with exceptional need may receive up to \$5,130).
- Total awards for fall, spring, and summer terms cannot exceed the annual maximum.
- TEG does NOT have a semester maximum.

2020-21 AWARD MAXIMUMS		
INSTITUTION TYPE	AWARD MAX/YEAR	EXCEPTIONAL NEED
PRIVATE/INDEPENDENT INSTITUTIONS	\$3,420	\$5,130
Undergraduate students whose EFCs are ≤ \$1,000 may receive up to the Exceptional Need award amount.		

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 used by the THECB to identify “comparable” institutions for the purpose of calculating tuition differentials, regardless of accreditation.

NOTE: All tuition rates (including public law school) will be published at a later date since the College Student Budget (CSB) Report was extended until **June 1, 2020**.

AWARD ADJUSTMENTS

Institutions may be required to make award adjustments in the following circumstances (see ^{NEW}[19 TAC, Section 22.11](#)):

- Student officially withdraws from enrollment.
 - The institution will use the general refund policy to determine the amount of financial aid to be reduced.
 - A refund is not owed to the program if a student drops or withdraws after the end of an institution’s refund period.
- Student’s disbursement exceeds his/her eligibility amount.
 - Recalculate eligibility amount.

NOTE: If funds are available after an award has been adjusted, they can be re-awarded to other eligible students at the institution. If the funds cannot be re-awarded, they must be returned to the THECB based on the [Timely Distribution of Funds](#).

OVER AWARDS

If an award has been disbursed and a student receives other assistance that exceeds the student’s financial need, the institution is **not** required to adjust the award unless the sum of the excess resources is greater than \$300 (see ^{NEW}[19 TAC, Section 22.11\(d\)](#)).

ADDITIONAL INFORMATION

TUITION DIFFERENTIAL EXAMPLE

- Charges for an independent 2-year institution (e.g., Jacksonville College) should be compared to public community college charges (Level 1).
- A Level 2 institution that only awards TEG to associate degree students (e.g., Southwestern Christian College) should compare its charges to those of public community colleges (Level 1).
- Levels 2, 3, 5, and 6 independent institutions (other than Southwestern Christian College) should compare their charges to the average charges of public institutions at the same levels.

Tuition Differential Calculation

- Institution Current Tuition Rate per SCH = \$475
- Institution SACS Level 5 = \$201
- Undergraduate student is enrolled in 9 SCH for fall and 12 SCH for spring.

To calculate tuition differential:

Institution Current Tuition Rate -
SACS Level Rate = Difference
x Total SCH = **Tuition Differential**

For Example:

\$475 - \$201 = \$274
\$274 x 21 SCH = \$5,754

This student is eligible for a TEG award since the tuition differential (\$5,754) is more than the maximum award (\$3,420).

PRORATION

Awards must be prorated if the student has been approved for an exception to the 3/4-time enrollment requirement due to a hardship circumstance:

UNDERGRADUATE HARDSHIP PRORATION SCHEDULE	ENROLLED 6-8 HOURS	ENROLLED < 6 HOURS
	50% of the maximum award amount	25% of the maximum award amount
GRADUATE HARDSHIP PRORATION SCHEDULE	ENROLLED 5-6 HOURS	ENROLLED < 5 HOURS
	50% of the maximum award amount	25% of the maximum award amount

PROCESSING FUNDS

REQUESTING AND RETURNING PROGRAM FUNDS

Institutions must submit a form online through the [Grant Payment System](#) software application (app) to request or return funds. The app can be accessed through the secure Coordinating Board Pass System (CBPass) portal on the Student Financial Aid Programs (SFAP) Information Webpage.

- **Requesting Funds:** Institutions can begin submitting requests for funding on **August 3, 2020**. The THECB will begin processing funds *after* **September 1, 2020**. Institutions have *until* the close of business on **August 1, 2021** (or the first working day thereafter if it falls on a weekend or holiday) to request program funds.
- **Returning Funds:** Institutions that submit a return of funds through the Grant Payment System should use the [Electronic Funds Transfer](#) process.

NOTE: Each biennium (the two-year state budget period), funds not requested in the first year can be carried forward 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.

TIMELY DISTRIBUTION OF FUNDS

Institutions **must** follow these requirements when processing program funds (see [19 TAC, Section 22.2](#)):

- Institutions have **3** business days after receiving the funds to apply the funds to a student's account.
- Institutions have **6** business days after receiving the funds to return undisbursed funds.
- Institutions have **45** calendar days from the date a student becomes ineligible to return disbursed funds.
- Institutions have **120** calendar days to return funds after a student has notified the institution of a decision to cancel the award.

LATE DISBURSEMENTS

Funds that are disbursed after the end of a student's period of enrollment must be used either to pay the student's outstanding balance for the period of enrollment, or to make a payment on an outstanding loan received during that period of enrollment. The institution is required to document the reason for a student's late disbursement. All late disbursements must be processed prior to the end of the state's fiscal year, unless granted an extension by the THECB. Under no circumstances should funds be released directly to the student in this situation (see ^{NEW} [19 TAC, Section 22.11\(g\)](#)).

AUTHORITY TO TRANSFER FUNDS

Institutions participating in a combination of TCWS, TEXAS Grant, TEOG, and TEG may transfer up to 10 percent of the institution's total annual program allocation or **\$20,000** (whichever is less) between programs within the relevant fiscal year. Transfer requests are submitted online through [CONTACT US](#) (select "Financial Aid Question" under Contact Reason). Institutions requesting a transfer of funds must submit a request by **July 1, 2021**. The Financial Aid Services staff will respond to the institution to provide next steps for the process.



TEXAS ARMED SERVICES SCHOLARSHIP PROGRAM

The Texas Higher Education Coordinating Board (THECB) Program Guidelines are intended to support institutions by highlighting requirements that appear in the Texas Education Code (TEC) and Title 19 of the Texas Administrative Code (TAC). When administering this program, institutions should always refer to the applicable statutes and rules. The information provided in this document is to be used solely as a resource and does not supersede the statute and/or rules for this program.

PROGRAM AUTHORITY AND PURPOSE

The Texas Armed Services Scholarship Program (TASSP) is authorized by [TEC, Chapter 61, Subchapter A, Section 61.9771](#). Rules establishing procedures to administer the subchapter can be found in [Title 19 of the TAC, Chapter 22, Subchapter I](#). The purpose of the TASSP is to encourage students to complete a baccalaureate degree and become members of the Texas Army National Guard, Texas Air National Guard, Texas State Guard, United States Coast Guard, or United States Merchant Marine, or to become commissioned officers in any branch of the armed services of the United States.

ELIGIBLE INSTITUTIONS

Public institutions of higher education, as defined in [TEC, Section 61.003\(8\)](#), and private or independent institutions of higher education, as defined in [TEC, Section 61.003\(15\)](#), can participate.

ELIGIBILITY

ELIGIBILITY REQUIREMENTS

This year the governor, lieutenant governor, state senators, and state representatives have until **August 31, 2020** to appoint initial TASSP candidates.

The governor and the lieutenant governor may each appoint two students and two alternates. Each state senator and state representative may appoint one student and one alternate.

TO RECEIVE AN APPOINTMENT, A STUDENT MUST MEET TWO OF THESE FOUR CRITERIA:

- ✓ Be on track to graduate or have graduated high school with the Distinguished Achievement Program (DAP), the distinguished level of achievement under the Foundation High School program, or the International Baccalaureate (IB) Program
- ✓ Have a high school grade point average (GPA) of 3.0 or higher on a 4.0 scale
- ✓ Have achieved a college readiness score on the SAT (1070) or ACT (23)
- ✓ Be ranked in the top one-third of the prospective high school graduating class

TO RECEIVE A SCHOLARSHIP, AN APPOINTED STUDENT MUST:

- ✓ Be registered with Selective Service, or be exempt
- ✓ Be enrolled and in good standing in a Reserve Officers' Training Corps (ROTC) program or another undergraduate officer commissioning program as certified by the institution
- ✓ Maintain satisfactory academic progress (SAP) as indicated by the financial aid office at the recipient's institution of higher education
- ✓ Enter into a written agreement with the THECB

 **STOP:** If a student fails to meet the requirements to initially receive a scholarship or fails to complete the application process by **October 15**, the student forfeits the scholarship. The THECB will notify the legislative office of their nominee's change in eligibility so that the legislator can submit an alternate student.

ADDITIONAL INFORMATION

TASSP APPLICATION PROCESS

- Students can identify a legislator by visiting [Who Represents Me](#).
- Interested students submit a [Texas Armed Services Scholarship Appointment Application](#) to the governor's office, or call (512) 463-1828.
- To contact the lieutenant governor's office, call (512) 463-0001.

If selected, the student will receive a Notice of Selection letter.



CERTIFICATION PROCESS

1. Once the student is enrolled in an eligible institution and ROTC program, the student must provide their Notice of Selection letter to the financial aid office.
2. The financial aid office will certify the student's program eligibility with the THECB.
3. Once the THECB receives the institution's eligibility certification, the student will complete the TASSP application online.



APPLICATION DEADLINE

Students must complete their TASSP online application by **October 15, 2020**.



SELECTIVE SERVICE STATEMENT

Male students must be registered with or exempt from Selective Service (SS) in order to be eligible to receive federal or state financial assistance. In accordance with [TEC, Section 51.9095](#), male students must file the required **Selective Service**

Statement of Registration Status (found below) with their institution or other entity granting or guaranteeing financial assistance. This includes grants, scholarships, loans, or other assistance funded by state revenue, including federal funds or gifts and grants accepted by the state.

When is the statement NOT Required?

- **When the SS registration is confirmed through the Institutional Student Information Record (ISIR):** The ISIR confirmation serves as the student’s official, signed statement because the Department of Education validates registration directly with the Selective Service System (SSS).
- **NEW** **When the SS registration is confirmed through the [SSS.gov website](#):** The institution can save the confirmation directly from the website to serve as the student’s official, signed statement on record.
- **NEW** **When the ISIR confirms that a student is under the age of 18:** No statement or documentation is needed for the applicable award year, even if the student turns 18 during that year.

When is the statement REQUIRED, including all supporting documentation?

- When the student completes a Free Application for Federal Student Aid (FAFSA) but is flagged “not registered” on the ISIR and SS status **cannot** be confirmed on the [SSS.gov website](#).
- **NEW** **When the student completes a Texas Application for State Financial Aid (TASFA):** The required statement is embedded in the 2020-21 TASFA and must be completed by the student.
- **NEW** When the student does not complete a FAFSA or TASFA but applies for state financial aid, such as through exemptions or waivers, and SS status **cannot** be confirmed on the [SSS.gov website](#).

ADDITIONAL INFORMATION

FREQUENCY COLLECTING THE STATEMENT

If the student’s status will NOT change, the statement and supporting documentation can be used for subsequent semesters. (Example: The student entered the U.S. after the eligible age to register.)

If the student’s status is temporary, the statement must be collected each academic year until the student is registered or determined exempt. (Example: Student is under age 18 but did not complete a FAFSA or TASFA.)

RETENTION SCHEDULE

The status statement and all documentation must be retained in the student’s record for 7 years after the date of completion of the award period ([TEC, Section 441.1855](#)).

REPROCESSED ISIRS

If the student’s most recent ISIR transaction has been reprocessed by the Central Processing System (CPS) and the registration with the SSS was confirmed, the institution does not need to collect the status statement or any documentation.

Institutions may collect the required status statement and documentation either electronically or on paper.
([English Statement](#) or [Spanish Statement](#))

SELECTIVE SERVICE STATEMENT OF REGISTRATION STATUS	
Male students must verify their current Selective Service registration status by marking one of the statements below and providing proof of their registration status to their current institution. Failure to do so may result in the loss of eligibility for state financial aid.	
<input type="checkbox"/> I am under the age of 18 and not currently required to register.	
<input type="checkbox"/> I am REGISTERED with the Selective Service and, <i>Check the following box that applies:</i> <input type="checkbox"/> I have already submitted proof of registration to my current institution. <input type="checkbox"/> Proof of registration is included with this statement. <input type="checkbox"/> I will submit proof of my registration. NOTE: Proof is required to be considered eligible for financial aid.	<input type="checkbox"/> I am EXEMPT from registration and, <i>Check the following box that applies:</i> <input type="checkbox"/> I have already submitted proof of my exemption to my current institution. <input type="checkbox"/> Proof of my exemption is included with this statement. <input type="checkbox"/> I will submit proof of my exemption. NOTE: Proof is required to be considered eligible for financial aid.
<input type="checkbox"/> I am over the age of 18. I am not registered with Selective Service and I am not exempt from registration with Selective Service.	
I, _____, hereby certify that the Selective Service status statement provided above is true and accurate.	
Student ID: _____	Signature: _____
Date: _____	

PROMISSORY NOTE

The THECB requires a scholarship recipient to sign a promissory note acknowledging the conditional nature of the scholarship and promising to repay the amount of the scholarship plus applicable interest, late charges, and any collection costs, including attorneys' fees, if the recipient fails to meet certain conditions of the scholarship.

Recipients agree to:

- Complete four years of ROTC training or the equivalent of four years of ROTC training if the institution of higher education awards ROTC credit for prior service in any branch of the U.S. Armed Services or the Texas Army National Guard, Texas Air National Guard, Texas State Guard, United States Coast Guard, or United States Merchant Marine, or another undergraduate officer commissioning program;
- Graduate no later than six years after the date the student first enrolls in an institution of higher education after having received a high school diploma or a General Educational Diploma or its equivalent;
- After graduation, enter into and provide the THECB with verification of:
 - A four-year commitment to be a member of the Texas Army National Guard, Texas Air National Guard, Texas State Guard, United States Coast Guard, or United States Merchant Marine; **or**
 - A contract to serve as a commissioned officer in any branch of the armed services of the United States;
- Meet the physical examination requirements and all other prescreening requirements of the Texas Army National Guard, Texas Air National Guard, Texas State Guard, United States Coast Guard, or United States Merchant Marine, or the branch of the armed services with which the student enters into a contract; and
- Repay the scholarship according to the terms of the promissory note if the student fails to meet the requirements in the [Conversion of a Scholarship to a Loan](#) section.

DISCONTINUATION OF ELIGIBILITY

A student may not receive a scholarship after having earned a baccalaureate degree or a cumulative total of 150 credit hours, including transferred hours that have been verified by the student's institution.



ALERT

REPLACEMENT SCHOLARSHIPS

If a recipient's scholarship converts to a loan prior to graduation:

Beginning with the academic year following that determination, the appointing official may appoint another eligible student to receive any available funds designated for the initial recipient who no longer meets the requirements for the scholarship.

The THECB will contact the nominating official who initially appointed the scholarship recipient and request a replacement recipient. The appointed replacement recipient will be notified of their scholarship by the THECB. The replacement recipient has **60 days** to notify their institution of their eligibility and complete their scholarship application; otherwise the scholarship will be forfeited.

AWARDING

The TASSP maximum is determined and announced annually by the THECB. A student cannot receive a scholarship for more than:

- **four of the six years** that are allowed for a student to graduate if the student is enrolled in a degree program of **four years or less**; OR
- **five of the six years** allowed for graduation, if enrolled in a degree program of **more than four years**.

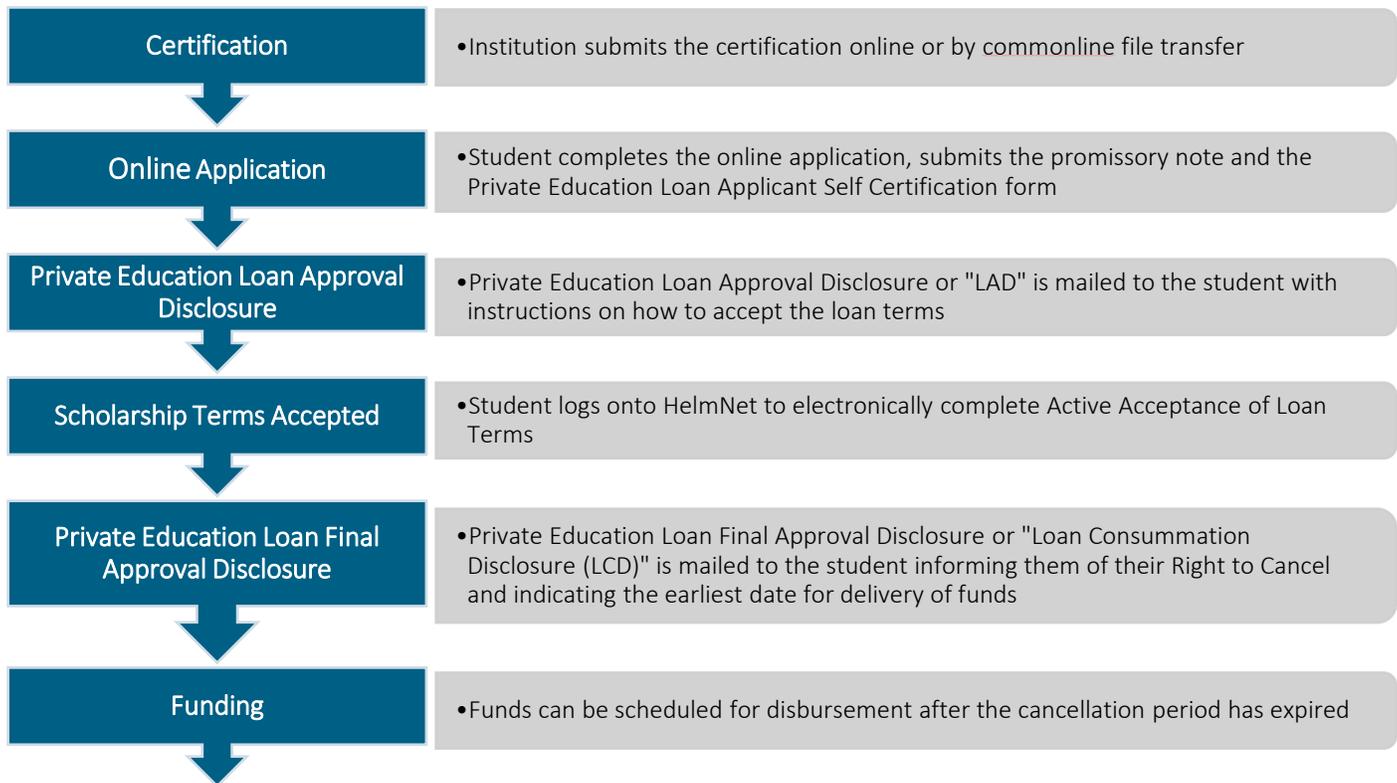
Institution Type	2020-21 Scholarship Maximum
Public and Private Institutions	\$10,000

The scholarship must be reduced by the amount paid to the student for being under contract with one of the branches of the armed services if the combined total exceeds the student's total cost of attendance (COA) for that academic year.

PROCESSING FUNDS

SCHOLARSHIP PROCESS FLOW

Below is the scholarship process flow that occurs when a student completes a TASSP application:



The earliest that funds can be disbursed is 11 business days after the LCD is mailed to borrower.



CERTIFYING FUNDS

Institutions have until **October 1, 2020** to certify TASSP. Funds will not be disbursed until the promissory note is signed by the student. Financial Aid Administrators can certify TASSP applications using one of these two methods:

- Certify the scholarship through the [HelmNet portal](#); OR
- Submit a Commonline Certification File using the [MOVEit DMZ](#) secure file transfer portal.

RETURNING PROGRAM FUNDS

A [Return of Funds Form \(RFF\)](#) must be submitted before any funds are returned to the THECB. This form is available on the Student Financial Aid Programs Information Webpage under **Online Resources**.

TIMELY DISTRIBUTION OF FUNDS

Institutions **must** follow these requirements when processing program funds (see [19 TAC, Section 22.2](#)):

- Institutions have **3** business days after receiving the funds to apply the funds to a student’s account.
- Institutions have **6** business days after receiving the funds to return undisbursed funds.
- Institutions have **45** calendar days from the date a student becomes ineligible to return disbursed funds.
- Institutions have **120** calendar days to return funds after a student has notified the institution of a decision to cancel the award.

REQUESTING SCHOLARSHIP CHANGES

ALERT: REQUIRED CONTACT US INQUIRY INFORMATION

To ensure inquiries are routed correctly, the following steps must be completed:

- **Received From:** Select Institution
- **Institution:** Enter the Institution’s Full Name
- **Contact Reason:** Select **Financial Aid Question** (regardless of the inquiry reason)

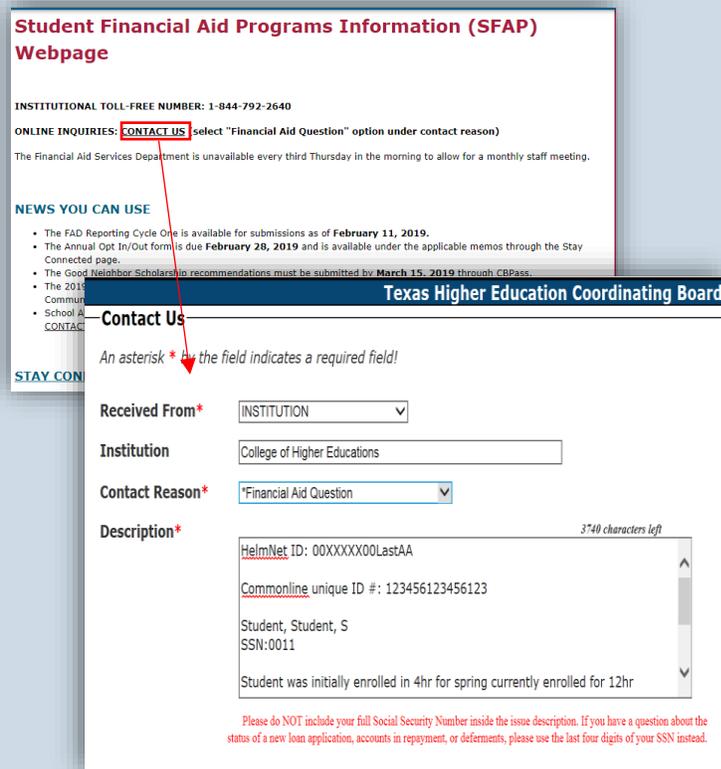
Enter the following information in the Description box:

- HelmNet portal ID
- Commonline Unique ID #: (16 Characters)
- Student’s first name, last name, and middle initial
- Last four digits of the student’s SSN

Provide a detailed explanation of the change needed:

Give as many details pertaining to your request as possible, for example:

- **Unclear request:** “Please update scholarship disbursement to 10-01-2020.”
- **Clear request:** “Please update scholarship disbursement #1 from 09-15-2020 to 10-01-2020.”



Student Financial Aid Programs Information (SFAP) Webpage

INSTITUTIONAL TOLL-FREE NUMBER: 1-844-792-2640

ONLINE INQUIRIES: **CONTACT US** (select "Financial Aid Question" option under contact reason)

The Financial Aid Services Department is unavailable every third Thursday in the morning to allow for a monthly staff meeting.

NEWS YOU CAN USE

- The FAD Reporting Cycle One is available for submissions as of **February 11, 2019**.
- The Annual Opt In/Out form is due **February 28, 2019** and is available under the applicable memos through the Stay Connected page.
- The Good Neighbor Scholars recommendations must be submitted by **March 15, 2019** through CBPass.
- The 2019 Communitas School A CONTACT

Texas Higher Education Coordinating Board

Contact Us

An asterisk * in the field indicates a required field!

Received From*

Institution

Contact Reason*

Description* 3740 characters left

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.

REPAYMENT

CONVERSION OF A SCHOLARSHIP TO A LOAN

A scholarship will become a loan if the recipient:

- Fails to maintain SAP;
- Withdraws from the scholarship program, as indicated through withdrawal or removal from the institution or that institution's ROTC program or other undergraduate officer commissioning program, without subsequent enrollment in another institution of higher education and that subsequent institution's ROTC program or other undergraduate officer commissioning program;
- Fails to fulfill one of the following:
 - A four-year commitment to be a member of the Texas Army National Guard, Texas Air National Guard, Texas State Guard, United States Coast Guard, or United States Merchant Marine; or
 - The minimum active service requirement included in a contract to serve as a commissioned officer in any branch of the armed services of the United States; honorable discharge is considered demonstration of fulfilling the minimum active service requirement.
- Does not submit documentation of the contract or commitment to the THECB within twelve months of graduation with a baccalaureate degree. Subsequently filing documentation will revert the loan back to a scholarship.

If a scholarship is converted to a loan, the student:

- Cannot regain scholarship eligibility in a subsequent academic year; and
- Loses eligibility to receive any future scholarships through the program.

LOAN REPAYMENT REQUIREMENTS

Once the scholarship is converted to a loan, the repayment requirements include:

- The student will have a 6-month grace after the scholarship becomes a loan before repayment begins; however, interest begins to accrue on the date the scholarship is converted to a loan.
- The TASSP loan has a 15-year repayment period, and a required minimum monthly payment of \$100, or an amount required to repay the loan within 15 years, whichever is greater.
- The TASSP interest rate will be the same rate charged for a College Access Loan at the time the funds were disbursed.
- If a past due payment amount is not received within 20 days of the scheduled due date, a past due penalty of 5 percent of the scheduled monthly payment or five dollars, whichever is less, will be charged.

NOTE: Students experiencing a medical disability or any type of financial hardship can apply for postponed or reduced payments and cancellation (medical disability only) of their TASSP loan either verbally or by submitting a [General Postponement Request](#) to the THECB.

ADDITIONAL INFORMATION

SCHOLARSHIP CONVERSION EXCEPTION

The THECB may grant an exception to not convert the scholarship to a loan if a student requires a temporary leave of absence from the institution, the ROTC program, or other undergraduate officer commissioning program for:

- personal reasons; OR
- to provide service for the Texas Army National Guard, Texas Air National Guard, Texas State Guard, United States Coast Guard, or United States Merchant Marine for fewer than twelve months.

NOTE: If a student is required to provide more than twelve months of service, the THECB can grant that student additional time to meet the graduation and service requirements specified in the TASSP agreement.

DEFERMENTS

An education deferment is available to any recipient whose loan is not in a default status and who provides the THECB documentation of enrollment as at least a half-time student.



COLLEGE ACCESS LOAN PROGRAM

The Texas Higher Education Coordinating Board (THECB) Program Guidelines are intended to support institutions by highlighting requirements that appear in the Texas Education Code (TEC) and Title 19 of the Texas Administrative Code (TAC). When administering this program, institutions should always refer to the applicable statutes and rules. The information provided in this document is to be used solely as a resource and does not supersede the statute and/or rules for this program.

PROGRAM AUTHORITY AND PURPOSE

The College Access Loan (CAL) Program is part of the Hinson-Hazlewood College Student Loan Program, authorized by [TEC, Chapter 52, Subchapter A](#). Rules establishing procedures to administer the subchapter can be found in [Title 19 of the TAC, Chapter 22, Subchapter C](#). The CAL Program provides alternative educational loans to Texas students who are unable to meet the Cost of Attendance (COA).

ELIGIBLE INSTITUTIONS

The following institutions and entities located in Texas are eligible to participate in the CAL Program:

- Public or private nonprofit institutions of higher education, including junior colleges, accredited by a recognized accrediting agency as defined in [TEC, Section 61.003](#); **OR**
- Entities, including Regional Education Services Centers, approved by the State Board of Educator Certification to offer an alternative certification program.

ELIGIBILITY

ELIGIBILITY REQUIREMENTS

STUDENTS MUST MEET THE FOLLOWING ELIGIBILITY REQUIREMENTS:	STUDENTS AND COSIGNERS MUST MEET THE FOLLOWING CREDIT APPROVAL REQUIREMENTS:
<ul style="list-style-type: none"> ✓ Be classified by the institution as a Texas resident ✓ Be registered with Selective Service, or be exempt ✓ Have insufficient resources to finance his or her education ✓ Be enrolled at least half-time or higher in <ul style="list-style-type: none"> • A course of study leading to a certificate, an associate, baccalaureate, graduate, or higher degree; OR • An approved alternative educator certification program ✓ Be meeting the satisfactory academic progress (SAP) requirements set by the institution ✓ Receive a favorable credit evaluation or provide a cosigner who has a good credit standing and meets other requirements 	<ul style="list-style-type: none"> ✓ Have an Experian VantageScore of 650 or higher ✓ Not have public records such as tax liens or bankruptcy proceedings ✓ Have a minimum of 4 credit trade lines, excluding student loans or authorized user accounts ✓ Not have defaulted on any federal or private education loans <div style="text-align: center; background-color: #00728f; color: white; padding: 5px; margin: 10px 0;">COSIGNERS MUST:</div> <ul style="list-style-type: none"> ✓ Be at least 21 years of age ✓ Have a regular source of income ✓ Not be the borrower or the spouse of the borrower ✓ Receive a favorable credit evaluation ✓ Be a U.S. citizen or a permanent U.S. resident and reside in the U.S. or in a U.S. territory

AWARDING

Students may receive CAL funding to cover reasonable expenses only, not to exceed the Cost of Attendance (COA) (see [IRS Certification Requirements](#)). When certifying a CAL, institutions are confirming that the amount of the requested loan is \$100 or greater and does not exceed the difference between the student’s COA and other forms of financial assistance for which the student is eligible (regardless of whether the student actually accepts the aid). The other forms of student assistance that must be considered when determining the amount of a CAL eligibility include:

- Free sources of student aid, such as gifts, grants and scholarships; **AND**
- The amount of any Federal Direct Stafford Loan (including subsidized and unsubsidized) that a student borrower is eligible to receive.
 - Eligibility for Federal PLUS loans should not be considered when determining the amount of a CAL.

NOTE: A student’s federal Direct Loan Program eligibility must be taken into consideration even if the institution does not package Direct Loans or if the student declines to complete a Free Application for Federal Student Aid (FAFSA).

ADDITIONAL INFORMATION

CAL INTEREST RATE CHANGE

Applications certified on or after May 1, 2019 will carry a fixed annual interest rate of 5.2%.

CALCULATING ELIGIBILITY FOR TASFA FILERS:

If a student files a Texas Application for State Financial Aid (TASFA), the financial assistance to be deducted should include all aid they were awarded. No Title IV eligibility would be included in the deduction of other forms of financial assistance when calculating the loan amount.

CALCULATING ELIGIBILITY FOR NON-FAFSA FILERS:

If a student is eligible but chooses not to file a FAFSA, the financial assistance to be deducted should include all aid they were awarded. The institution must also deduct the maximum Direct Loan eligibility (including subsidized and unsubsidized) based on the student’s grade level and the institution’s best determination of dependency status (even if the institution does not participate in the Direct Loan program). If the institution has nothing in their records that would suggest the student is independent, then dependent can be used as the default.



SELECTIVE SERVICE STATEMENT

Male students must be registered with or exempt from Selective Service (SS) in order to be eligible to receive federal or state financial assistance. In accordance with [TEC, Section 51.9095](#), male students must file the required **Selective Service**

Statement of Registration Status (found below) with their institution or other entity granting or guaranteeing financial assistance. This includes grants, scholarships, loans, or other assistance funded by state revenue, including federal funds or gifts and grants accepted by the state.

When is the statement NOT Required?

- **When the SS registration is confirmed through the Institutional Student Information Record (ISIR):** The ISIR confirmation serves as the student’s official, signed statement because the Department of Education validates registration directly with the Selective Service System (SSS).
- **NEW When the SS registration is confirmed through the [SSS.gov website](#):** The institution can save the confirmation directly from the website to serve as the student’s official, signed statement on record.
- **NEW When the ISIR confirms that a student is under the age of 18:** No statement or documentation is needed for the applicable award year, even if the student turns 18 during that year.

When is the statement REQUIRED, including all supporting documentation?

- When the student completes a Free Application for Federal Student Aid (FAFSA) but is flagged “not registered” on the ISIR and SS status **cannot** be confirmed on the [SSS.gov website](#).
- **NEW When the student completes a Texas Application for State Financial Aid (TASFA):** The required statement is embedded in the 2020-21 TASFA and must be completed by the student.
- **NEW** When the student does not complete a FAFSA or TASFA but applies for state financial aid, such as through exemptions or waivers, and SS status **cannot** be confirmed on the [SSS.gov website](#).

Institutions may collect the required status statement and documentation either electronically or on paper.
[\(English Statement](#) or [Spanish Statement](#))

ADDITIONAL INFORMATION

FREQUENCY COLLECTING THE STATEMENT
 If the student’s status will NOT change, the statement and supporting documentation can be used for subsequent semesters. (Example: The student entered the U.S. after the eligible age to register.)
 If the student’s status is temporary, the statement must be collected each academic year until the student is registered or determined exempt. (Example: Student is under age 18 but did not complete a FAFSA or TASFA.)

RETENTION SCHEDULE
 The status statement and all documentation must be retained in the student’s record for 7 years after the date of completion of the award period ([TEC, Section 441.1855](#)).

REPROCESSED ISIRS
 If the student’s most recent ISIR transaction has been reprocessed by the Central Processing System (CPS) and the registration with the SSS was confirmed, the institution does not need to collect the status statement or any documentation.

SELECTIVE SERVICE STATEMENT OF REGISTRATION STATUS	
Male students must verify their current Selective Service registration status by marking one of the statements below and providing proof of their registration status to their current institution. Failure to do so may result in the loss of eligibility for state financial aid.	
<input type="checkbox"/> I am under the age of 18 and not currently required to register.	
<input type="checkbox"/> I am REGISTERED with the Selective Service and, <i>Check the following box that applies:</i> <input type="checkbox"/> I have already submitted proof of registration to my current institution. <input type="checkbox"/> Proof of registration is included with this statement. <input type="checkbox"/> I will submit proof of my registration. NOTE: Proof is required to be considered eligible for financial aid.	<input type="checkbox"/> I am EXEMPT from registration and, <i>Check the following box that applies:</i> <input type="checkbox"/> I have already submitted proof of my exemption to my current institution. <input type="checkbox"/> Proof of my exemption is included with this statement. <input type="checkbox"/> I will submit proof of my exemption. NOTE: Proof is required to be considered eligible for financial aid.
<input type="checkbox"/> I am over the age of 18. I am not registered with Selective Service and I am not exempt from registration with Selective Service.	
I, _____, hereby certify that the Selective Service status statement provided above is true and accurate.	
Student ID: _____	Signature: _____
Date: _____	

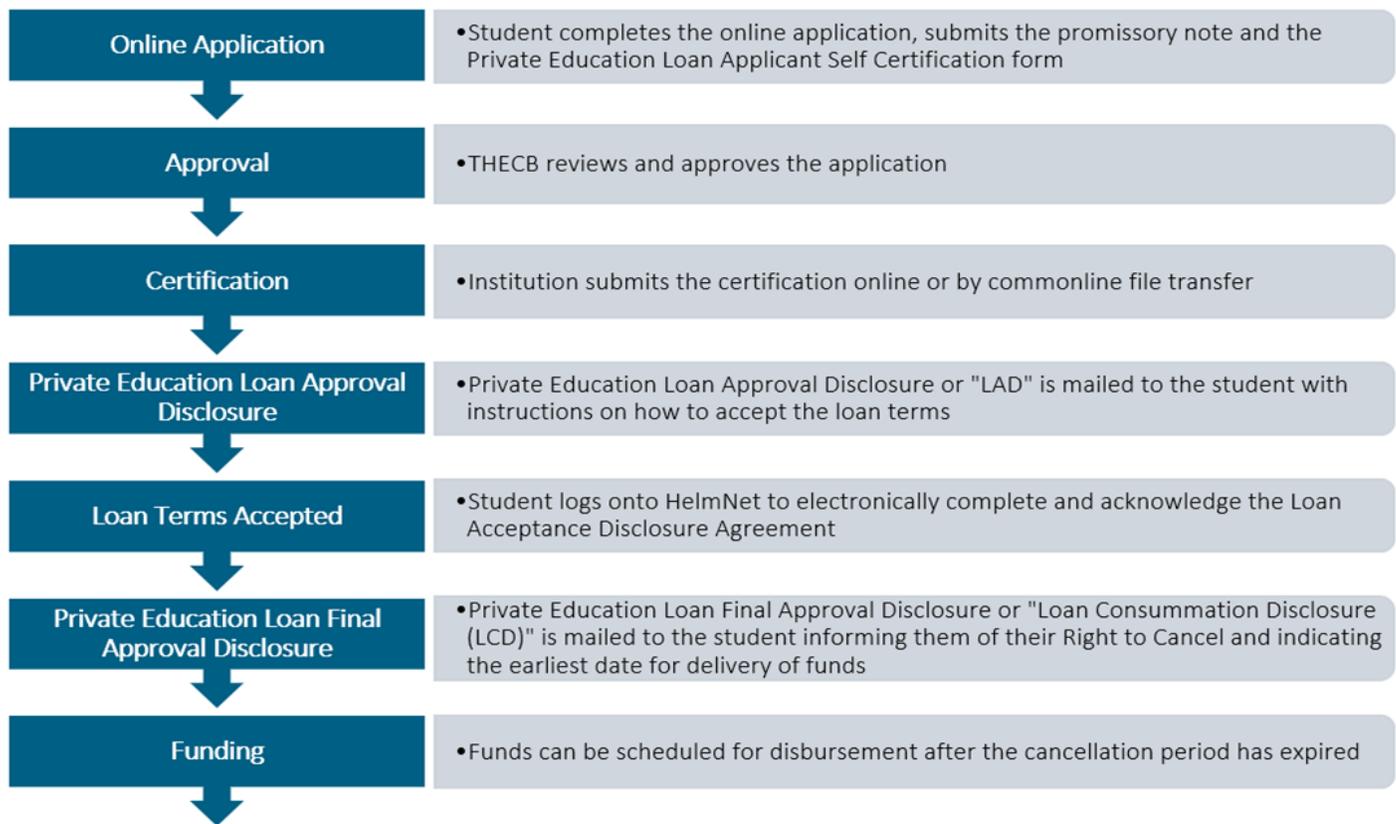
SATISFACTORY ACADEMIC PROGRESS (SAP)

A student must be meeting the minimum satisfactory academic progress (SAP) requirements of the institution in the semester any loan is made. Institutions have the flexibility to define what it means to meet SAP requirements. If a student is not meeting the institution’s SAP, a documented appeal process may be used to determine if the student is eligible for CAL. A student can receive a CAL if a SAP appeal has been approved by the institution.

PROCESSING FUNDS

LOAN PROCESS FLOW

Below is the loan process flow that occurs when a borrower completes a CAL application:



The earliest a loan can be disbursed is 11 business days after the LCD is mailed to borrower.



CERTIFYING LOAN APPLICATIONS

Institutions can certify eligible loans throughout the academic year on an as-needed basis. The certification of the loan cannot exceed the student's requested amount. Funds will not be disbursed until the promissory note is signed by the borrower (and cosigner, when applicable) and the Financial Aid Administrator certifies the loan application using one of the following two methods:

- Certify the loan through the [HelmNet](#) loan portal; **OR**
- Submit a **Commonline Loan Certification File** using the [MOVEit DMZ](#) secure file transfer portal.

REQUESTING LOAN CHANGES

A CAL can never exceed the amount certified by the institution. After certification, a CAL can be increased up to the original certified amount when:

- The student cancels all or part of the loan but later ends up needing the money during the loan period.
- The student becomes ineligible prior to the disbursement from the THECB. The institution cancels the loan but the student later becomes eligible during the loan period.
- The institution has already returned funds to the THECB during the loan period but needs all or part of the funds reissued.

The institution can request in writing through [CONTACT US](#) that the loan be increased or reinstated up to the original certification amount. The institutions must confirm that the loan does not exceed the difference between the student's COA and other forms of financial assistance for which the student is eligible.

A CAL **cannot** be increased in the following situation:

- The institution certifies LESS than what the student was pre-approved to borrow.

For example: The student ends up needing more money after certification and wants to increase his or her current loan amount. The loan amount CANNOT be increased beyond the certified amount by the institution even though the student may have been pre-approved for more than what was certified.



STOP: REINSTATING CANCELED LOANS

Institutions can send a request in writing through CONTACT US to reinstate a canceled loan or disbursement. Requests received more than 60 days after the end of the loan period will not be processed.

Common reasons why loans are canceled by the THECB:

- Student did not approve the Loan Acceptance Disclosure (LAD) within 45 days of loan certification.
- Student was reported by the National Student Clearinghouse (NSC) database as enrolled less than half-time.
- Student contacted the THECB and canceled the loan without informing the institution.

ADDITIONAL INFORMATION

HELMNET LOAN PORTAL

THECB's Higher Education Loan Management System (HELMS) allows institutions, students, and cosigners to manage loan accounts through a secure online portal called HelmNet.

LOGIN PAGE

[HelmNet Portal](#)

- Institutions must submit a [System Authorization Form](#) to the THECB to request access to certify a loan.
- Students and cosigners must each create an online account to apply for a loan or view the status of any loans with the THECB.

REQUESTING LOAN CHANGES CONTINUED

! ALERT: REQUIRED [CONTACT US](#) INQUIRY INFORMATION

To ensure inquiries are routed correctly, the following steps must be completed:

- Select Institution
- Enter the Institution's Full Name
- Select **Financial Aid Question** (regardless of the inquiry reason)

Enter the following information in the Description box:

- HelmNet Loan portal ID
- Commonline Unique ID #: (16 Characters)
- Student's first name, last name, and middle initial
- Last four digits of the student's SSN

Provide a detailed explanation of the change needed:

Give as many details pertaining to your request as possible, for example:

- **Unclear request:** "Please update the loan disbursement to 04-01-2020."
- **Clear request:** "Please update loan disbursement #1 from 01-15-2020 to 04-01-2020."

Student Financial Aid Programs Information (SFAP) Webpage

INSTITUTIONAL TOLL-FREE NUMBER: 1-844-792-2640

ONLINE INQUIRIES: **CONTACT US** select "Financial Aid Question" option under contact reason)

The Financial Aid Services Department is unavailable every third Thursday in the morning to allow for a monthly staff meeting.

NEWS YOU CAN USE

Texas Higher Education Coordinating Board

Contact Us

An asterisk * by the field indicates a required field!

Received From*

Institution

Contact Reason*

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.

RETURNING PROGRAM FUNDS

A [Return of Funds Form \(RFF\)](#) must be submitted before any funds are returned to the THECB. This form is available on the Student Financial Aid Programs (SFAP) Information Webpage under **Online Resources**.

TIMELY DISTRIBUTION OF FUNDS

Institutions **must** follow these requirements when processing program funds (see [19 TAC, Section 22.2](#)):

- Institutions have **3** business days after receiving the funds to apply the funds to a student's account.
- Institutions have **6** business days after receiving the funds to return undisbursed funds.
- Institutions have **45** calendar days from the date a student becomes ineligible to return disbursed funds.
- Institutions have **120** calendar days to return funds after a student has notified the institution of a decision to cancel the award.

REPAYMENT

The CAL has a 6-month grace period beginning on the date the student ceases to be enrolled at least half-time at an eligible institution. Repayment is scheduled to begin after the expiration of the 6-month grace period. All loans have a minimum monthly repayment amount of \$50. There is a maximum repayment period of 10 years for loans with a principal balance under \$30,000, and a maximum repayment period of 20 years for loans with a principal balance of \$30,000 or more. If the balance is greater than \$30,000 at the time the account initially enters repayment, the monthly payment amount must be enough to pay off the entire debt in no more than 20 years. The CAL will not be sold to another lender.

NOTE: Borrowers who enroll in the Automatic Debit (ACH) payment service will receive a 0.25% interest rate reduction on the interest rate of each applicable loan in repayment.

 **UPDATED: ANNUAL STUDENT LOAN DEBT DISCLOSURE ([19 TAC, SECTION 21.49](#))**

All participating institutions must provide students with a letter, in an electronic format, estimating each student's total loan obligations, at least once a year. The purpose of this letter is to provide students with timely information on their education loan debt so that they can make informed decisions about student loan borrowing.

Student loan debt disclosures must include:

- All education loan debt from the National Student Loan Data System (NSLDS), as well as information that the institution may reasonably collect from its own records.
- An estimate of the unpaid amount of federal education loans and state education loans obtained by the student at the current institution. The types of education loans must be identified for each total included.
- *An estimate of the total payoff amount or a range for that amount, including principal and interest.
- *An estimate of monthly repayment amount, including principal and interest.

*At a minimum, institutions shall provide this information based on a 10-year repayment plan.



EDUCATIONAL AIDE EXEMPTION PROGRAM

The Texas Higher Education Coordinating Board (THECB) Program Guidelines are intended to support institutions by highlighting requirements that appear in the Texas Education Code (TEC) and Title 19 of the Texas Administrative Code (TAC). When administering this program, institutions should always refer to the applicable statutes and rules. The information provided in this document is to be used solely as a resource and does not supersede the statute and/or rules for this program.

PROGRAM AUTHORITY AND PURPOSE

The Educational Aide Exemption (EAE) Program is authorized by [TEC, Chapter 54, Section 54.363](#). Rules establishing procedures to administer the subchapter can be found in [Title 19 of the TAC, Chapter 21, Subchapter II](#). The purpose of the EAE Program is to encourage certain Educational Aides to complete full teacher certification by providing need-based exemptions from the payment of tuition and certain mandatory fees at Texas public institutions of higher education.

ELIGIBLE INSTITUTIONS

All public institutions, as defined by [TEC, Section 61.003\(8\)](#), are invited annually to participate in the EAE allocation process. Those choosing not to participate will not be considered in the allocation calculation for the applicable year.

ELIGIBILITY

ELIGIBILITY REQUIREMENTS

TO RECEIVE AN INITIAL AWARD, A STUDENT MUST:

- ✓ Be classified by the institution as a Texas resident
- ✓ Be registered with Selective Service, or be exempt
- ✓ Have financial need
- ✓ Meet the institution's satisfactory academic progress requirements
- ✓ Have been employed by a public school district in Texas working in the classroom directly with the students on a full-time basis as:
 - An Educational Aide* for at least one school year, during the five years preceding the term or semester for which the student received the initial award
 - OR
 - A substitute teacher for 180 or more full days during the five years preceding the term or semester for which the student received the initial award
- ✓ Be employed in some capacity by a public school district in Texas during the full term for which the student receives the award
- ✓ Be enrolled in courses required for teacher certification in one or more subject areas experiencing a critical shortage of teachers at public schools in Texas, as determined by the Texas Education Agency (TEA). The [2020-21 critical shortage areas](#) include:
 - Bilingual/English as a Second Language – Elementary and Secondary Levels
 - Special Education – Elementary and Secondary Levels
 - Career and Technical Education – Secondary Levels
 - Technology Applications and Computer Science – Secondary Levels
 - Mathematics – Secondary Levels

*Certified by TEA as an [Educational Aide I,II,III](#)

TO RECEIVE A CONTINUATION AWARD, A STUDENT MUST:

- ✓ Meet all initial award requirements
- ✓ Meet the institution's financial aid grade point average (GPA) requirement for making satisfactory academic progress toward a degree or certificate in accordance with the institution's policy
- ✓ If classified as an undergraduate, have not completed an excessive number of semester credit hours (SCH) as defined in [TEC, Section 54.014](#)

If the student received an EAE award prior to fall 2012:

- ✓ Meet all initial award requirements (**excluding** the critical shortage area obligation)
- ✓ Be enrolled in courses required for teacher certification or, if enrolled in lower-level coursework, sign a statement indicating an intention to become certified as a teacher in Texas

ADDITIONAL INFORMATION

GRADUATE STUDENT ELIGIBILITY

Students enrolled in graduate courses leading to teacher certification in a teacher shortage area are eligible for the EAE.

FINANCIAL NEED

The EAE Program does not have an EFC limitation or a maximum adjusted gross income (AGI) requirement. To qualify, applicants must have financial need as defined in [19 TAC, Section 21.1081\(8\)](#).

An eligible applicant can be awarded the amount required to exempt the student from payment of resident tuition and fees for courses taken during the applicable term, even if the award amount exceeds the student's financial need.

SCHOOL DISTRICT EMPLOYEE ELIGIBILITY

Eligible applicants can be employed in any capacity at a Texas public school district (e.g., bus driver), provided the applicant has the required educational aide work experience. Awarded students must remain employed for the full term.

APPLICATION DEADLINE

A student must submit the [2020-21 EAE Application](#) to the financial aid office prior to the end of the semester in which he or she is enrolled to be considered for an award.

CONTINUATION OF ELIGIBILITY

A student can continue to receive this exemption in subsequent semesters or terms if the student:

- Meets the institution's satisfactory academic progress (SAP) requirement for financial aid

NOTE: A student who fails to meet the grade point average (GPA) to satisfy the institution's SAP requirement may have the ability to regain eligibility for this exemption if he or she meets the GPA requirement during an upcoming term or semester in which the exemption was not awarded. The student may also be granted a hardship **exception** by the institution.

DISCONTINUATION OF ELIGIBILITY

A student may **not** continue to receive this exemption in a subsequent semester or term if the student:

- Has attempted a number of undergraduate hours considered to be excessive under [TEC, Section 54.2001\(a\)\(2\)](#)

NOTE: At the start of a semester or term, if an undergraduate student is attempting hours considered to be excessive, the student may continue to receive this exemption if he or she is granted a hardship **extension** by the institution.



STOP: EXCESSIVE UNDERGRADUATE HOURS

The excessive hours calculation excludes:

- Hours earned exclusively by examination
- Hours earned for a course credit received toward the person's high school academic requirements
- Hours earned for developmental courses that the institution required the person to take under [TEC, Section 51.331](#)
- Hours described in [TEC, Section 61.0595\(d\)](#)

HARDSHIP PROVISIONS

Institutions must adopt a hardship policy that may grant a student an **exception** from meeting the GPA requirement to satisfy the institution's SAP, or an **extension** of eligibility for excess undergraduate hours, when a student has a showing of a hardship or other good cause, including:

- A showing of a severe illness or other debilitating condition that could affect the student's academic performance;
- An indication that the student is responsible for the care of a sick, injured, or needy person and that the student's provision of care could affect the student's academic performance;
- The student's active duty or other service in the United States armed forces or the student's active duty in the Texas National Guard; **or**
- Any other cause considered acceptable by the institution.

All hardship decisions must be documented in the student's record and be available for submission to the THECB, if requested.

EXEMPTION FROM STUDENT TEACHING

- An individual who receives a baccalaureate degree required for a teaching certificate based on higher education coursework completed while receiving an EAE award is not required to participate in any field experience or internship consisting of student teaching to receive a teaching certificate.
- An individual who receives a baccalaureate degree prior to receiving a first EAE award is not eligible for a student teaching exemption.



SELECTIVE SERVICE STATEMENT

Male students must be registered with or exempt from Selective Service (SS) in order to be eligible to receive federal or state financial assistance. In accordance with [TEC, Section 51.9095](#), male students must file the required **Selective Service Statement of Registration Status** (found below) with their institution or other entity granting or guaranteeing financial assistance. This includes grants, scholarships, loans, or other assistance funded by state revenue, including federal funds or gifts and grants accepted by the state.

When is the statement NOT Required?

- **When the SS registration is confirmed through the Institutional Student Information Record (ISIR):** The ISIR confirmation serves as the student’s official, signed statement because the Department of Education validates registration directly with the Selective Service System (SSS).
- **NEW** **When the SS registration is confirmed through the [SSS.gov website](#):** The institution can save the confirmation directly from the website to serve as the student’s official, signed statement on record.
- **NEW** **When the ISIR confirms that a student is under the age of 18:** No statement or documentation is needed for the applicable award year, even if the student turns 18 during that year.

When is the statement REQUIRED, including all supporting documentation?

- When the student completes a Free Application for Federal Student Aid (FAFSA) but is flagged “not registered” on the ISIR and SS status **cannot** be confirmed on the [SSS.gov website](#).
- **NEW** **When the student completes a Texas Application for State Financial Aid (TASFA):** The required statement is embedded in the 2020-21 TASFA and must be completed by the student.
- **NEW** **When the student does not complete a FAFSA or TASFA but applies for state financial aid, such as through exemptions or waivers, and SS status cannot** be confirmed on the [SSS.gov website](#).

ADDITIONAL INFORMATION

FREQUENCY COLLECTING THE STATEMENT

If the student’s status will NOT change, the statement and supporting documentation can be used for subsequent semesters. (Example: The student entered the U.S. after the eligible age to register.)

If the student’s status is temporary, the statement must be collected each academic year until the student is registered or determined exempt. (Example: Student is under age 18 but did not complete a FAFSA or TASFA.)

RETENTION SCHEDULE

The status statement and all documentation must be retained in the student’s record for 7 years after the date of completion of the award period ([TEC, Section 441.1855](#)).

REPROCESSED ISIRS

If the student’s most recent ISIR transaction has been reprocessed by the Central Processing System (CPS) and the registration with the SSS was confirmed, the institution does not need to collect the status statement or any documentation.

Institutions may collect the required status statement and documentation either electronically or on paper.

([English Statement](#) or [Spanish Statement](#))

SELECTIVE SERVICE STATEMENT OF REGISTRATION STATUS <small>Male students must verify their current Selective Service registration status by marking one of the statements below and providing proof of their registration status to their current institution. Failure to do so may result in the loss of eligibility for state financial aid.</small>	
<input type="checkbox"/> I am under the age of 18 and not currently required to register.	
<input type="checkbox"/> I am REGISTERED with the Selective Service and, <small>Check the following box that applies:</small> <input type="checkbox"/> I have already submitted proof of registration to my current institution. <input type="checkbox"/> Proof of registration is included with this statement. <input type="checkbox"/> I will submit proof of my registration. NOTE: Proof is required to be considered eligible for financial aid.	<input type="checkbox"/> I am EXEMPT from registration and, <small>Check the following box that applies:</small> <input type="checkbox"/> I have already submitted proof of my exemption to my current institution. <input type="checkbox"/> Proof of my exemption is included with this statement. <input type="checkbox"/> I will submit proof of my exemption. NOTE: Proof is required to be considered eligible for financial aid.
<input type="checkbox"/> I am over the age of 18. I am not registered with Selective Service and I am not exempt from registration with Selective Service.	
I, _____, hereby certify that the Selective Service status statement provided above is true and accurate.	
Student ID: _____	Signature: _____
Date: _____	

AWARDING

Students receiving awards through the EAE Program will be exempted from the payment of the total resident tuition and required fees, other than laboratory and class fees, for courses taken during the applicable term. Institutions must determine the applicant's eligibility to receive the exemption and notify both the applicant and the school district employing the applicant.

 **STOP:** An EAE award can only be applied to courses for which an institution receives formula funding.

NOTE: Frequently asked questions (FAQs) are available on the Student Financial Aid Programs Information Webpage under **Program Resources**.

- [Institutional FAQs](#)
- [Student FAQs](#)

REQUIRED MATCHING

Participation in the EAE Program requires that institutions use institutional matching funds to cover **at least** 10 percent of each recipient's exemption.

Example	Total Tuition & Fees	Institutional Match Percentage (10% minimum)	Institutional Match Total	EAE Award Amount (Tuition/Fees <i>minus</i> Institutional Match)
Institution A	\$1480	10%	\$148	<i>\$1332</i>
Institution B	\$1800	20%	\$360	<i>\$1440</i>
Institution C	\$1100	30%	\$330	<i>\$770</i>

PROCESSING FUNDS

REQUESTING PROGRAM FUNDS

Institutions can begin submitting requests for funding on **August 3, 2020**. The THECB will begin processing funds *after* **September 1, 2020**. Institutions have *until* the close of business on **August 1, 2021** (or the first working day thereafter if it falls on a weekend or holiday) to request program funds.

When requesting funds, eligible institutions must submit a [Funds Request Form \(FRF\)](#), which is available on the Student Financial Aid Programs Information Webpage under **Program Resources**.

RETURNING PROGRAM FUNDS

A [Return of Funds Form \(RFF\)](#) must be submitted before any funds are returned to the THECB. This form is available on the Student Financial Aid Programs Information Webpage under **Online Resources**.



TEXAS COLLEGE WORK-STUDY PROGRAM

The Texas Higher Education Coordinating Board (THECB) Program Guidelines are intended to support institutions by highlighting requirements that appear in the Texas Education Code (TEC) and Title 19 of the Texas Administrative Code (TAC). When administering this program, institutions should always refer to the applicable statutes and rules. The information provided in this document is to be used solely as a resource and does not supersede the statute and/or rules for this program.

PROGRAM AUTHORITY AND PURPOSE

The Texas College Work-Study (TCWS) Program is authorized by [TEC, Chapter 56, Subchapter E, Section 56.073](#). Rules establishing procedures to administer the subchapter can be found in [Title 19 of the TAC, Chapter 22, Subchapter G](#). The purpose of the TCWS Program is to provide employment to eligible students with financial need. These positions are funded by a combination of state appropriations and funds from employers.

STATE PRIORITY DEADLINE ([TEC, SECTION 56.008](#) and [19 TAC, SECTION 22.6](#))

The THECB provides a uniform priority deadline for applications that qualify for state-funded financial assistance in an academic year. General Academic Teaching Institutions (GATIs) in Texas (*including* Lamar State College-Orange and Lamar State College-Port Arthur), as defined in [TEC, Section 61.003\(3\)](#), must publicize and use **January 15** as the state priority deadline for identifying eligible students to be given priority in receiving awards through the state financial aid programs. Institutions may define how their students must meet the priority deadline and are encouraged to adopt a policy describing the actions that students must take to meet the deadline.

ELIGIBLE INSTITUTIONS

Any public, private, or independent institution of higher education as defined in [TEC, Section 61.003](#), except a theological or religious seminary institution, is eligible to participate in the TCWS Program.

ELIGIBILITY

ELIGIBILITY REQUIREMENTS

TO RECEIVE A TCWS AWARD, A STUDENT MUST:

- ✓ Be classified by the institution as a Texas resident
- ✓ Be registered with Selective Service, or be exempt
- ✓ Have financial need
- ✓ Be enrolled at least 1/2 time in a plan leading to a degree or certification
- ✓ Not be a recipient of an athletic scholarship (i.e., the student is obliged to play an intercollegiate sport as a condition of receiving the scholarship) during any semester TCWS is awarded
- ✓ Not be enrolled in a seminary or other program leading to ordination or licensure to preach for a religious sect or to be a member of a religious order

ELIGIBLE EMPLOYERS

Participating institutions may enter into agreements with outside employers to participate in the TCWS Program. To be eligible to participate, an employer must:

- Provide part-time employment to an eligible student in non-partisan and non-sectarian activities
- Provide employment that is related to the student's academic interests, when possible
- Use TCWS Program positions only to supplement and not to supplant positions normally filled by persons not eligible to participate in the program

ADDITIONAL INFORMATION

NON-RESIDENT STUDENTS

Non-resident students are not eligible to receive TCWS even if they are eligible to pay resident tuition.

An affidavit student who can provide the appropriate documentation proving eligibility to be employed in the United States may secure employment through the TCWS Program. This includes Deferred Action for Childhood Arrivals (DACA) recipients.

HOURS OF EMPLOYMENT

TCWS Program participants can only work **part-time**. Hours worked may vary according to a student's TCWS award amount and the employer's definition of a part-time employee ([TEC, Section 56.076\(a\)\(1\)](#)).



SELECTIVE SERVICE STATEMENT

Male students must be registered with or exempt from Selective Service (SS) in order to be eligible to receive federal or state financial assistance. In accordance with [TEC, Section 51.9095](#), male students must file the required **Selective Service Statement of Registration Status** (found below) with their institution or other entity granting or guaranteeing financial assistance. This includes grants, scholarships, loans, or other assistance funded by state revenue, including federal funds or gifts and grants accepted by the state.

When is the statement NOT Required?

- **When the SS registration is confirmed through the Institutional Student Information Record (ISIR):** The ISIR confirmation serves as the student’s official, signed statement because the Department of Education validates registration directly with the Selective Service System (SSS).
- **NEW When the SS registration is confirmed through the [SSS.gov website](#):** The institution can save the confirmation directly from the website to serve as the student’s official, signed statement on record.
- **NEW When the ISIR confirms that a student is under the age of 18:** No statement or documentation is needed for the applicable award year, even if the student turns 18 during that year.

When is the statement REQUIRED, including all supporting documentation?

- When the student completes a Free Application for Federal Student Aid (FAFSA) but is flagged “not registered” on the ISIR and SS status **cannot** be confirmed on the [SSS.gov website](#).
- **NEW When the student completes a Texas Application for State Financial Aid (TASFA):** The required statement is embedded in the 2020-21 TASFA and must be completed by the student.
- **NEW** When the student does not complete a FAFSA or TASFA but applies for state financial aid, such as through exemptions or waivers, and SS status **cannot** be confirmed on the [SSS.gov website](#).

ADDITIONAL INFORMATION

FREQUENCY COLLECTING THE STATEMENT

If the student’s status will NOT change, the statement and supporting documentation can be used for subsequent semesters. (Example: The student entered the U.S. after the eligible age to register.)

If the student’s status is temporary, the statement must be collected each academic year until the student is registered or determined exempt. (Example: Student is under age 18 but did not complete a FAFSA or TASFA.)

RETENTION SCHEDULE

The status statement and all documentation must be retained in the student’s record for 7 years after the date of completion of the award period ([TEC, Section 441.1855](#)).

REPROCESSED ISIRS

If the student’s most recent ISIR transaction has been reprocessed by the Central Processing System (CPS) and the registration with the SSS was confirmed, the institution does not need to collect the status statement or any documentation.

Institutions may collect the required status statement and documentation either electronically or on paper.
[\(English Statement](#) or [Spanish Statement](#))

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Male students must verify their current Selective Service registration status by marking one of the statements below and providing proof of their registration status to their current institution. Failure to do so may result in the loss of eligibility for state financial aid.	
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_____ I am over the age of 18. I am not registered with Selective Service and I am not exempt from registration with Selective Service.	
I, _____, hereby certify that the Selective Service status statement provided above is true and accurate.	
Student ID: _____	Signature: _____ Date: _____

AWARDING

Institutions must use the TCWS allocation for employment during the nine-month academic year (fall and spring terms). A TCWS award, which includes state and employer matching funds, cannot exceed the student's calculated need.

! **ALERT:** Beginning with the 2020-21 academic year, institutions are no longer required to provide any off-campus positions. House Bill 3808 **repealed** TEC, Section 56.076(b), which required institutions to ensure that at least 20 percent, but no more than 50 percent, of the employment provisions provided through TCWS are provided by off-campus employers.

SUMMER AWARDS

Institutions may use any **reallocated** funds for summer awards and those funds must be expended by **August 31** of the current fiscal year.

REQUIRED MATCHING

Participating **for-profit** employers must:

- Provide at least 50 percent of an employed student's wages and 100 percent of other employee benefits for the employed student.

Participating **non-profit** employers must:

- Provide at least 25 percent of an employed student's wages and 100 percent of other employee benefits for the employed student from sources other than federal college work-study program funds, unless institutions are eligible for a waiver of matching funds. Institutions that are eligible for Title III funds from the U.S. Department of Education (ED) are exempt from the TCWS requirement that nonprofit employers provide 25 percent of an employed student's wages. To qualify for this exemption, institutions must submit a current copy of the Title III eligibility letter to the THECB.

AWARD ADJUSTMENTS

Institutions may be required to make award adjustments in the following circumstances (see **NEW** [19 TAC, Section 22.11](#)):

- Student officially withdraws from enrollment.
 - The institution will use the general refund policy to determine the amount of financial aid to be reduced.
 - A refund is not owed to the program if a student drops or withdraws after the end of an institution's refund period.
- Student's disbursement exceeds his/her eligibility amount.
 - Recalculate eligibility amount.

NOTE: If funds are available after an award has been adjusted, they can be re-awarded to other eligible students at the institution. If the funds cannot be re-awarded, they must be returned to the THECB based on the Timely Distribution of Funds (see [19 TAC, Section 22.2](#)).

OVER AWARDS

If an award has been disbursed and a student receives other assistance that exceeds the student's financial need, the institution is **not** required to adjust the award unless the sum of the excess resources is greater than \$300 (see **NEW** [19 TAC, Section 22.11\(d\)](#)).

PROCESSING FUNDS

ALLOCATION

At the start of the fiscal year, each participating institution's full allocation of funds will be disbursed. Funds for public universities, Health-Related Institutions (HRIs), and technical institutes will be transferred to each institution's cost center at the Comptroller's Office. Funds for community colleges and private/independent institutions will be sent to each institution's designated bank or other fiduciary institution, via direct deposit or Automated Clearing House (ACH).

RETURNING PROGRAM FUNDS

Unused funds must be returned to the THECB after the end of the spring term. A [Return of Funds Form \(RFF\)](#) must be submitted before any funds are returned to the THECB. This form is available on the Student Financial Aid Programs Information Webpage under **Online Resources**.

AUTHORITY TO TRANSFER FUNDS

Institutions participating in a combination of TCWS, TEXAS Grant, TEOG, and TEG may transfer up to 10 percent of the institution's total annual program allocation or **\$20,000** (whichever is less) between programs within the relevant fiscal year. Transfer requests are submitted online through [CONTACT US](#) (select "Financial Aid Question" under Contact Reason). Institutions requesting a transfer of funds must submit a request by **July 1, 2021**. The Financial Aid Services staff will respond to the institution to provide next steps for the process.



WORK-STUDY STUDENT MENTORSHIP PROGRAM

The Texas Higher Education Coordinating Board (THECB) Program Guidelines are intended to support institutions by highlighting requirements that appear in the Texas Education Code (TEC) and Title 19 of the Texas Administrative Code (TAC). When administering this program, institutions should always refer to the applicable statutes and rules. The information provided in this document is to be used solely as a resource and does not supersede the statute and/or rules for this program.

PROGRAM AUTHORITY AND PURPOSE

The Work-Study Student Mentorship Program (WSMP) is authorized by [TEC Chapter 56, Subchapter E, Section 56.079](#). Rules establishing procedures to administer the program can be found in [Title 19 of the TAC, Chapter 4, Subchapter J](#). The purpose of the mentorship program is to provide employment to eligible students with financial need to mentor, tutor, or advise students at participating institutions of higher education or high school students within local school districts and nonprofit organizations. The primary goal of the program is to improve student access, success, and completion of higher education. These student mentorship positions are funded by a combination of state appropriations provided by the Texas College Work-Study (TCWS) Program and matching funds from participating institutions.

NOTE: Administrative rules for this program are being updated and will be moved to [Title 19 of the TAC, Chapter 22, Subchapter G](#) in 2020.

ELIGIBLE INSTITUTIONS

Any public, private, or independent institution of higher education as defined in [TEC, Section 61.003](#), except theological or religious seminary institutions, is eligible to participate. Independent institutions of higher education offering only professional or graduate degrees are **NOT** eligible to participate in the WSMP.

PROGRAM PARTICIPATION REQUIREMENTS

INSTITUTION REQUIREMENTS

To participate, an eligible institution must establish a Work-Study Student Mentorship Program designed to improve student access, success, and completion of higher education. Programs must be structured to offer on-campus or off-campus mentoring, tutoring, or advising services. Institutions implementing programs **on-campus** should make every effort to incorporate services to underrepresented students.

Institutions that implement an **off-campus** program to serve local high school students must partner with school districts and nonprofit organizations through a Memorandum of Understanding (MOU). The MOU agreement details the roles and responsibilities of each participating entity and must be in place prior to program implementation. The institution must provide a copy of the MOU to the THECB ([sample MOU](#)).

Each Work-Study Student Mentorship Program must provide the following:

- Part-time employment to eligible students as mentors, tutors, or advisors
 - Salary requirements:
 - Minimum of \$10 an hour
 - Maximum of 20 hours per week
- Training as determined by the THECB
- Program oversight
- Matching funds, including partner match ([see Required Matching section](#))

TRAINING REQUIREMENTS

Participating institutions must ensure that WSMP award recipients receive training that covers the following topics:

- Overview of the THECB’s strategic plan and the role the recipient will play to help meet the goals and objectives of the plan.
- Overview of general knowledge around college access and completion.
- Overview of workforce skills that could be attained during employment.
- Personal, public, economic, and societal benefits of higher education.
- Specific information about applying to college, including college exploration, the admission process, authoring personal essays, completing the financial aid process, and submitting college application forms.



STOP: To ensure compliance with program requirements, the THECB will conduct desk reviews and site visits. For information regarding records and retention, please refer to section 4.13 within the signed MOUs.

WSMP ACTIVITY EXAMPLES

- Provide information to high school students about higher education, including the college selection process, the application process, and financial aid options.
- Assist students in finding and using appropriate resources, such as the [College for All Texans website](#).
- Assist students in completing the Free Application for Federal Student Aid (FAFSA), ApplyTexas application, or other college applications.
- Assist in special outreach events, such as College Nights or FAFSA Saturdays.
- Assist college students with academic tutoring or mentoring.
- Assist with student interventions focused on increasing completion of degrees or certificates, such as interventions occurring through peer advising or supplemental instruction.
- Establish a student and parent outreach center through community partnerships and provide tools and information to help families make decisions about going to college.

ELIGIBILITY

ELIGIBILITY REQUIREMENTS

Student WSMP eligibility requirements are the same as those in the Texas College Work-Study (TCWS) program. To ensure applicant eligibility, program leads should check with their financial aid office to determine whether students can be employed by the WSMP.

TO RECEIVE A WSMP AWARD, A STUDENT MUST:

- ✓ Be classified by the institution as a Texas resident
- ✓ Be registered with Selective Service, or be exempt
- ✓ Have financial need
- ✓ Be enrolled at least 1/2 time at the participating institution, in a plan leading to a degree or certification
- ✓ Not be a recipient of an athletic scholarship (i.e., the student is obliged to play an intercollegiate sport as a condition of receiving the scholarship) during any semester the student is awarded WSMP funds
- ✓ Not be enrolled in a seminary or other program leading to ordination or licensure to preach for a religious sect or to be a member of a religious order

 **ALERT:** These program administration areas are overseen by the financial aid office:

- State Priority Deadline
- Selective Service Statement
- Calculating Award Amounts
- Award Adjustments
- Over Awards

ADDITIONAL INFORMATION

NON-RESIDENT STUDENTS

Non-resident students are not eligible to receive WSMP funds even if they are eligible to pay resident tuition.

An affidavit student who can provide the appropriate documentation proving eligibility to be employed in the United States may secure employment through the WSMP. This includes Deferred Action for Childhood Arrivals (DACA) recipients.

STATE PRIORITY DEADLINE

The THECB provides a uniform priority deadline ([TEC, Section 56.008](#) and [19 TAC, Section 22.6](#)) for applications that qualify for state-funded financial assistance in an academic year. General Academic Teaching Institutions (GATIs) in Texas (including Lamar State College-Orange and Lamar State College-Port Arthur), as defined in [TEC, Section 61.003\(3\)](#), must publicize and use **January 15** as the state priority deadline for identifying eligible students to be given priority in receiving awards through the state financial aid programs. Institutions may define how their students must meet the priority deadline and are encouraged to adopt a policy describing the actions that students must take to meet the deadline.



SELECTIVE SERVICE STATEMENT

Male students must be registered with or exempt from Selective Service (SS) in order to be eligible to receive federal or state financial assistance. In accordance with [TEC, Section 51.9095](#), male students must file the required **Selective Service Statement of Registration Status** (found below) with their institution or other entity granting or guaranteeing financial assistance. This includes grants, scholarships, loans, or other assistance funded by state revenue, including federal funds or gifts and grants accepted by the state.

When is the statement NOT Required?

- **When the SS registration is confirmed through the Institutional Student Information Record (ISIR):** The ISIR confirmation serves as the student’s official, signed statement because the Department of Education validates registration directly with the Selective Service System (SSS).
- **NEW** **When the SS registration is confirmed through the [SSS.gov website](#):** The institution can save the confirmation directly from the website to serve as the student’s official, signed statement on record.
- **NEW** **When the ISIR confirms that a student is under the age of 18:** No statement or documentation is needed for the applicable award year, even if the student turns 18 during that year.

When is the statement REQUIRED, including all supporting documentation?

- When the student completes a Free Application for Federal Student Aid (FAFSA) but is flagged “not registered” on the ISIR and SS status **cannot** be confirmed on the [SSS.gov website](#).
- **NEW** **When the student completes a Texas Application for State Financial Aid (TASFA):** The required statement is embedded in the 2020-21 TASFA and must be completed by the student.
- **NEW** When the student does not complete a FAFSA or TASFA but applies for state financial aid, such as through exemptions or waivers, and SS status **cannot** be confirmed on the [SSS.gov website](#).

ADDITIONAL INFORMATION

FREQUENCY COLLECTING THE STATEMENT

If the student’s status will NOT change, the statement and supporting documentation can be used for subsequent semesters. (Example: The student entered the U.S. after the eligible age to register.)

If the student’s status is temporary, the statement must be collected each academic year until the student is registered or determined exempt. (Example: Student is under age 18 but did not complete a FAFSA or TASFA.)

RETENTION SCHEDULE

The status statement and all documentation must be retained in the student’s record for 7 years after the date of completion of the award period ([TEC, Section 441.1855](#)).

REPROCESSED ISIRS

If the student’s most recent ISIR transaction has been reprocessed by the Central Processing System (CPS) and the registration with the SSS was confirmed, the institution does not need to collect the status statement or any documentation.

Institutions may collect the required status statement and documentation either electronically or on paper.

[\(English Statement\)](#) or [\(Spanish Statement\)](#)

SELECTIVE SERVICE STATEMENT OF REGISTRATION STATUS

Male students must verify their current Selective Service registration status by marking one of the statements below and providing proof of their registration status to their current institution. Failure to do so may result in the loss of eligibility for state financial aid.

<p><input type="checkbox"/> I am under the age of 18 and not currently required to register.</p> <p><input type="checkbox"/> I am REGISTERED with the Selective Service and, <i>Check the following box that applies:</i></p> <p><input type="checkbox"/> I have already submitted proof of registration to my current institution.</p> <p><input type="checkbox"/> Proof of registration is included with this statement.</p> <p><input type="checkbox"/> I will submit proof of my registration.</p> <p style="font-size: x-small; color: red;">NOTE: Proof is required to be considered eligible for financial aid.</p>	<p><input type="checkbox"/> I am EXEMPT from registration and, <i>Check the following box that applies:</i></p> <p><input type="checkbox"/> I have already submitted proof of my exemption to my current institution.</p> <p><input type="checkbox"/> Proof of my exemption is included with this statement.</p> <p><input type="checkbox"/> I will submit proof of my exemption.</p> <p style="font-size: x-small; color: red;">NOTE: Proof is required to be considered eligible for financial aid.</p>
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I am over the age of 18. I am not registered with Selective Service and I am not exempt from registration with Selective Service.

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

Student ID: _____ Signature: _____ Date: _____

AWARDING

Funds awarded to the employed student are considered financial aid for the academic year in which the funds are earned and therefore cannot **exceed** the student's financial need.

Financial Need is defined as the cost of attendance (COA) minus the expected family contribution (EFC).

Example 1:

$$10,000 \text{ (COA)} - 3,000 \text{ (EFC)} = \$7,000 \text{ (Financial Need)}$$

In this example, the student has financial need and may be eligible for a WSMP award up to \$7,000 for the academic year.

Example 2:

$$10,000 \text{ (COA)} - 15,000 \text{ (EFC)} = -\$5,000 \text{ (No Financial Need)}$$

In determining who should receive a WSMP award, a student's financial need must be calculated.

AWARD ADJUSTMENTS

Institutions may be required to make award adjustments in the following circumstances (see [NEW 19 TAC, Section 22.11](#)):

- Student officially withdraws from enrollment.
 - The institution will use the general refund policy to determine the amount of financial aid to be reduced.
 - A refund is not owed to the program if a student drops or withdraws after the end of an institution's refund period.
- Student's disbursement exceeds his/her eligibility amount.
 - Recalculate eligibility amount.

OVER AWARDS

If an award has been disbursed and a student receives other assistance that exceeds the student's financial need, the institution is **not** required to adjust the award unless the sum of the excess resources is greater than \$300 (see [NEW 19 TAC, Section 22.11\(d\)](#)).

PROCESSING FUNDS

At the start of the fiscal year, each participating institution's full allocation of funds for the WSMP will be disbursed. Funds designated for public universities, health-related institutions (HRIs), and technical institutes will be transferred to each institution's cost center at the Comptroller's Office. Funds for community colleges and private/independent institutions will be sent to each institution's designated fiduciary institution via Electronic Funds Transfer (EFT).

WSMP funds may be issued to eligible students throughout the academic year, including summer. Funds may be used only for hourly wages paid to eligible student mentors, tutors, or advisors. Each biennium, funds not expended by the institution in the first year can be carried forward for use in the second year. Any carry-forward funds not expended in the second year of the biennium must be returned to the THECB. Although the WSMP has carry-forward authority, every effort should be made to expend funds within the same year that the funds are disbursed to the institution.

Carry Forward During the 2020-2021 Biennium

FY 2020

- State Fiscal Year begins September 1, 2019 and ends August 31, 2020.
- Unexpended FY 2020 funds can be *carried forward* into FY 2021.

FY 2021

- State Fiscal Year begins September 1, 2020 and ends August 31, 2021.
- All funds for the biennium (including any *carry-forward* funds from FY 2020) must be expended by August 31, 2021.

NOTE: A *biennium* is defined as a two-year state budget period.

REQUIRED MATCHING

Participating institutions must provide at least a 10 percent match of a WSMP-employed student's wages. In addition, institutions are required to fund 100 percent of a student's employee benefits. Institutional funds used for the wage match and employee benefits must come from sources other than federal college work-study.

Institutions that are **eligible for Title III funds** from the U.S. Department of Education **are exempt from all matching requirements for the WSMP**. To qualify for this exemption, institutions must submit a current copy of the Title III eligibility letter to the THECB.

NEW ALERT: School district and nonprofit partners must contribute matching funds (either cash or in-kind) that are at least equal to the amount of the institution's contribution. The amount will be determined within the MOU with the participating WSMP institution. The school district and nonprofit partners must provide documentation of their matching funds to the institution.

IMPORTANT: School district and nonprofit partners are **exempt** from the matching requirements if the participating WSMP institution is exempt from the 10 percent match of a WSMP-employed student's wages.

REPORTING

REPORTING REQUIREMENTS

Participating institutions must report to the THECB the progress made by students being assisted through the WSMP. To comply with the Family Educational Rights and Privacy Act (FERPA), participating institutions must have authority to gather, review, and report to the THECB appropriate data from all partners for evaluation purposes. Reports will be submitted through a secure online portal. Failure to meet the program reporting requirements may result in the loss of funding.

To meet the reporting requirements, institutions must submit a **Financial Report** and a **Data Report** that collects aggregate information. Samples of the report templates are provided on the Quick Reference page under [Available Forms](#). The Data Report template includes a Program Overview tab and an Activity and Persistence Data tab within the spreadsheet.

Persistence Data includes each of the following:

- Number of students employed as mentors, tutors, or advisors in the preceding year.
- Number of college students from the participating institution receiving mentoring, tutoring, or advising in the preceding year.
- Number of high school students receiving mentoring, tutoring, or advising from students of the participating institution in the preceding year.
- Information relating to the costs of the program.
- The academic progress made by each of the following in the preceding year:
 - Students of the participating institution receiving mentoring, tutoring, or advising;
 - High school students receiving mentoring, tutoring, or advising from students of the participating institution.

The table below shows the due dates for the required reports. If the due date falls on a holiday or a weekend, reports are due on the following business day.

Financial Report and Annual Data Report		
Report	Reporting Period	Due Date
<ul style="list-style-type: none"> • Financial Report 	September 1 - May 31, 2021	June 5, 2021
<ul style="list-style-type: none"> • Financial Report • Data Report <ul style="list-style-type: none"> ○ Program Overview ○ Program Activities ○ Persistence Data 	September 1 - August 31, 2021	September 5, 2021



STOP: The data submitted on the **Financial Report** will be used to reconcile totals submitted to the THECB on the **Financial Aid Database (FAD)**. To ensure data are reported accurately, program directors should reconcile expenditures with the campus financial aid office.

APPENDIX 1: QUICK REFERENCES

CONTACT INFORMATION

<p style="text-align: center;">Vanessa Malo Program Director, College Success Phone: (512) 427-6267 Email: Vanessa.Malo@highered.texas.gov</p>	<p>Contact us by completing an online inquiry form and select “Financial Aid Question” as the Contact Reason.</p>
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OTHER RESOURCES FOR INSTITUTIONS

General program information for institutions	Student Financial Aid Programs Information Webpage
Work-Study Student Mentorship Program Webpage	WSMP Webpage
Texas Program Statutes	Texas Education Code
Texas Program Rules	Texas Administrative Code
Updated information concerning student financial aid programs, procedures, allocations, and other topics is communicated to institutions through the GovDelivery system. To receive these communications, interested individuals must subscribe.	GovDelivery
Federal Selective Service Requirement Guide	Who Must Register Chart

AVAILABLE FORMS

Financial Report Template
Data Report Template
Sample MOU
Refund Instructions



BILINGUAL EDUCATION PROGRAM

The Texas Higher Education Coordinating Board (THECB) Program Guidelines are intended to support institutions by highlighting requirements that appear in the General Appropriations Act (GAA). When administering this program, institutions should always refer to the GAA. The information provided in this document is to be used solely as a resource and does not supersede the General Appropriations Act, HB 1, Article III, Section 52, 86th Texas Legislature.

PROGRAM PURPOSE

The purpose of the Bilingual Education Program is to encourage students who enroll in an educator preparation program at a participating university to earn a certification to teach bilingual education, English as a second language (ESL), or Spanish in public school districts in Texas with high critical needs.

ELIGIBLE INSTITUTIONS

The following institutions are eligible to participate in the Bilingual Education Program:

- University of North Texas
- University of North Texas at Dallas
- Texas Woman's University
- The University of Texas at Dallas
- The University of Texas at Arlington
- Texas A&M - Commerce
- DFW Tech Teach, in consultation with Texas Tech University

ELIGIBILITY

ELIGIBILITY REQUIREMENTS

TO RECEIVE AN AWARD, A STUDENT MUST:

- ✓ Be admitted to a teacher education program at a participating institution in bilingual education or other comparable program for teacher education in English as a second language (ESL) or Spanish
- ✓ Have demonstrated financial need, as determined by the completion of a Free Application for Federal Student Aid (FAFSA) or Texas Application for State Financial Aid (TASFA) and the institution's financial aid office
- ✓ Successfully pass the State Board for Educator Certification Bilingual Target Language Proficiency Test
- ✓ Maintain a minimum cumulative 3.0 GPA



SELECTIVE SERVICE STATEMENT

Male students must be registered with or exempt from Selective Service (SS) in order to be eligible to receive federal or state financial assistance. In accordance with [TEC, Section 51.9095](#), male students must file the required **Selective Service Statement of Registration Status** (found below) with their institution or other entity granting or guaranteeing financial assistance. This includes grants, scholarships, loans, or other assistance funded by state revenue, including federal funds or gifts and grants accepted by the state.

When is the statement NOT Required?

- **When the SS registration is confirmed through the Institutional Student Information Record (ISIR):** The ISIR confirmation serves as the student’s official, signed statement because the Department of Education validates registration directly with the Selective Service System (SSS).
- **NEW** **When the SS registration is confirmed through the [SSS.gov website](#):** The institution can save the confirmation directly from the website to serve as the student’s official, signed statement on record.
- **NEW** **When the ISIR confirms that a student is under the age of 18:** No statement or documentation is needed for the applicable award year, even if the student turns 18 during that year.

When is the statement REQUIRED, including all supporting documentation?

- When the student completes a Free Application for Federal Student Aid (FAFSA) but is flagged “not registered” on the ISIR and SS status **cannot** be confirmed on the [SSS.gov website](#).
- **NEW** **When the student completes a Texas Application for State Financial Aid (TASFA):** The required statement is embedded in the 2020-21 TASFA and must be completed by the student.
- **NEW** **When the student does not complete a FAFSA or TASFA but applies for state financial aid, such as through exemptions or waivers, and SS status cannot** be confirmed on the [SSS.gov website](#).

ADDITIONAL INFORMATION

FREQUENCY COLLECTING THE STATEMENT
 If the student’s status will NOT change, the statement and supporting documentation can be used for subsequent semesters. (Example: The student entered the U.S. after the eligible age to register.)
 If the student’s status is temporary, the statement must be collected each academic year until the student is registered or determined exempt. (Example: Student is under age 18 but did not complete a FAFSA or TASFA.)

RETENTION SCHEDULE
 The status statement and all documentation must be retained in the student’s record for 7 years after the date of completion of the award period ([TEC, Section 441.1855](#)).

REPROCESSED ISIRS
 If the student’s most recent ISIR transaction has been reprocessed by the Central Processing System (CPS) and the registration with the SSS was confirmed, the institution does not need to collect the status statement or any documentation.

Institutions may collect the required status statement and documentation either electronically or on paper.

[\(English Statement\)](#) or [\(Spanish Statement\)](#)

SELECTIVE SERVICE STATEMENT OF REGISTRATION STATUS	
Male students must verify their current Selective Service registration status by marking one of the statements below and providing proof of their registration status to their current institution. Failure to do so may result in the loss of eligibility for state financial aid.	
____ I am under the age of 18 and not currently required to register.	
____ I am REGISTERED with the Selective Service and, Check the following box that applies: <input type="checkbox"/> I have already submitted proof of registration to my current institution. <input type="checkbox"/> Proof of registration is included with this statement. <input type="checkbox"/> I will submit proof of my registration. NOTE: Proof is required to be considered eligible for financial aid.	____ I am EXEMPT from registration and, Check the following box that applies: <input type="checkbox"/> I have already submitted proof of my exemption to my current institution. <input type="checkbox"/> Proof of my exemption is included with this statement. <input type="checkbox"/> I will submit proof of my exemption. NOTE: Proof is required to be considered eligible for financial aid.
____ I am over the age of 18. I am not registered with Selective Service and I am not exempt from registration with Selective Service.	
I, _____, hereby certify that the Selective Service status statement provided above is true and accurate.	
Student ID: _____	Signature: _____ Date: _____

AWARDING

Students receiving awards through the Bilingual Education Program are issued grants in the form of tuition assistance.

STOP: Other Costs Associated with the Program

Allocated funding cannot be used to cover “other costs associated” with the Bilingual Education Program. In the General Appropriations Act of the 86th Texas Legislature, the phrase “develop and operate a program” was removed from the first sentence of the program rider. In previous years, that language allowed institutions to dedicate funds for other costs associated with running the program. Beginning with the 2020-2021 biennium, all program funds must

PROCESSING FUNDS

REQUESTING PROGRAM FUNDS

Institutions can begin submitting requests for funding on **August 3, 2020**. The THECB will begin processing funds *after September 1, 2020*. Institutions have *until* the close of business on **August 1, 2021** (or the first working day thereafter if it falls on a weekend or holiday) to request program funds.

When requesting funds, eligible institutions must submit a [Funds Request Form \(FRF\)](#), which is available on the Student Financial Aid Programs [Work-Study & Scholarships webpage](#) under **Bilingual Education Program**.

RETURNING PROGRAM FUNDS

A [Return of Funds Form \(RFF\)](#) must be submitted before any funds are returned to the THECB. This form is available on the Student Financial Aid Programs [Online Resources webpage](#) under Forms.

REPORTING

Participating institutions are required to submit a report (using a template provided by the THECB) detailing annual information on the following performance measures:

- Bilingual Education Program student graduation rates;
- Passage rates for the Texas Examination of Education Standards Bilingual Education Supplemental exam **or** the English as a Second Language Supplemental exam; **and**
- Graduate employment data at Texas public school districts.
 - Number of Bilingual Education Program students employed after graduation in a Texas public school district
 - Names of Texas school districts employing Bilingual Education Program graduates
 - Number of Bilingual Education Program students furthering education beyond the educator preparation program

ALERT: Graduate Employment Data

Institutions should establish a process to collect the required public-school reporting data on Bilingual Education Program students post-graduation.

REPORTING TIMELINE

The THECB is required to collect Bilingual Education Program data for the 2020-2021 biennium, which includes the 2019-20 (FY 2020) and 2020-21 (FY 2021) award years. The required data will be requested during the **second** year of a biennium. Report templates and due dates will be sent to participating institutions for the **FY 2020-2021 Biennium Report** and **FY 2020-2021 End of Year (EOY) Report**.

APPENDIX 1: GENERAL APPROPRIATIONS ACT, HB 1, ARTICLE III, SECTION 52, 86TH TEXAS LEGISLATURE

52. Program to Encourage Certification to Teach Bilingual Education, English as a Second Language, or Spanish. Out of the funds appropriated above in Strategy E.1.5, Bilingual Education Program, the Coordinating Board shall allocate in equal amounts to the University of North Texas, University of North Texas at Dallas, Texas Woman’s University, The University of Texas at Dallas, The University of Texas Arlington, Texas A&M Commerce and DFW Tech Teach, in consultation with Texas Tech University, to be used for grants to provide financial incentives in the form of tuition assistance, to encourage students who enroll in an educator preparation program at the university to become certified to teach bilingual education, English as a Second Language, or Spanish in school districts with high critical needs. Any balances on hand at the end of fiscal year 2020 may be carried over to fiscal year 2021 for the same purpose.

The program shall make awards to qualified students admitted to the Teacher Education Program in Bilingual Education or other comparable programs for teacher education in English as a second language or Spanish. Qualified students must: 1) have demonstrated financial need, as determined by the completion of a Free Application for Federal Student Aid form and the institution’s financial aid office; 2) Successfully pass the State Board for Educator Certification Bilingual Target Language Proficiency Test; and 3) Maintain a minimum cumulative 3.0 GPA.

The program shall submit a report not later than January 1, 2021, to the Texas Higher Education Coordinating Board detailing annual information on the following performance measures:

- a. Student graduation rates from the program;
- b. Passage rates for the Texas Examination of Education Standards Bilingual Education Supplemental exam and/or the English as a Second Language Supplemental exam; and Graduate employment data at Texas public school districts.

APPENDIX 2: QUICK REFERENCES

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.

OTHER RESOURCES FOR INSTITUTIONS

General program information for institutions	Student Financial Aid Programs Information Webpage
General loan information	HHloans
Texas Program Statutes	Texas Education Code
Texas Program Rules	Texas Administrative Code
First-time users will be required to create an account for CBPass and then request access to the online Grant Payment application.	CBPass CBPass User Instruction Guide

AVAILABLE FORMS

Directors of Financial Aid must submit a form to add, update, or remove a user’s access to state financial aid web portals through the THECB.	System Authorization Form
A form is required when returning funds for all state grant, scholarship, Educational Aide Exemption, and loan program funds.	Special Programs Online Return of Funds Form Loan Programs Online Return of Funds Form
The THECB accepts funds electronically as an Automated Clearing House (ACH) or wire transfer.	Electronic Funds Transfer Information