

# 2021-22

# State Financial Aid Program Guidelines



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.

**NEW:** Statutes (TEC) and rules (TAC) periodically change and may affect the links referenced in this document. Copies of statutes and rules used to create these guidelines are available in [Appendix 2](#).

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### PROGRAM AUTHORITY AND PURPOSE ([19 TAC, SECTION 22.225](#))

The Toward EXcellence, Access, & Success (TEXAS) Grant Program is authorized by [TEC Chapter 56, Section 56.302](#). 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.

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### 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.

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### ELIGIBLE INSTITUTIONS ([19 TAC, SECTION 22.227](#))

GATIs (*excluding* Lamar State College-Orange and Lamar State College-Port Arthur) and Health-Related Institutions (HRIs) are eligible to make both initial year (IY) and renewal year (RY) awards from a single allocation.

## ELIGIBILITY

### INITIAL ELIGIBILITY REQUIREMENTS ([19 TAC, SECTION 22.228](#) AND [22.230](#))

#### TO RECEIVE AN INITIAL YEAR (IY) AWARD, A STUDENT MUST:

- ✓ be classified by the institution as a Texas resident
- ✓ be registered with Selective Service, or be exempt (see [Appendix 1](#))
- ✓ 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).
  - **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.
  - **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).
  - **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)



#### **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 2021-22 is **\$6,234**.

## 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 their high school transcript evaluated.

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

## RENEWAL ELIGIBILITY REQUIREMENTS ([19 TAC, SECTION 22.228](#) AND [22.230](#))

### TO RECEIVE A RENEWAL YEAR (RY) AWARD, A STUDENT MUST:

- ✓ be classified by the institution as a Texas resident
- ✓ be registered with Selective Service, or be exempt (see [Appendix 1](#))
- ✓ 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
  - 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
  - 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 ([19 TAC, SECTION 22.230](#))

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 they meet **all** other eligibility requirements and **one** of the following conditions exists:

- the student received a certificate of discharge by the Texas Department of Criminal Justice or a correctional facility, or 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
- 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 ([19 TAC, SECTION 22.230](#))

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
<b>INITIAL RECIPIENT BY:</b> <ul style="list-style-type: none"> <li>ASSOCIATE DEGREE</li> </ul>	<b>3 years</b> from the first semester awarded	<b>4 years</b> from the first semester awarded	150 SCH	90 SCH No hardship allowed
<b>INITIAL RECIPIENT BY:</b> <ul style="list-style-type: none"> <li>HIGH SCHOOL GRADUATE</li> <li>TEOG TRANSFER</li> <li>MILITARY DISCHARGE</li> </ul>	<b>5 years</b> from the first semester awarded	<b>6 years</b> from the first semester awarded	150 SCH	150 SCH No hardship allowed

**\*\*Attempted hours** are 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 (**including dual credit**) 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 ([19 TAC, SECTION 22.231](#))

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 student enrolled for fewer than six hours CANNOT receive a TEXAS Grant award, regardless of the circumstances, including hardships ([See TAC, Section 22.230\(b\)](#)).

## SATISFACTORY ACADEMIC PROGRESS (SAP) ([19 TAC, SECTION 22.229](#))

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.

## AWARDING

### PRIORITY AWARDING ([19 TAC, SECTION 22.233](#))

If allocated funds are insufficient to award all eligible students, below is the priority for awarding funds:

- Precedence goes to Renewal Year (RY) students over Initial Year (IY) students.
- Once all eligible RY students have been awarded, precedence goes to eligible IY applicants who do not exceed the Priority EFC.
  - Of eligible applicants not exceeding the Priority EFC, greatest precedence goes to those meeting the **Priority Model** criteria ([TEC, Section 56.303\(f\)](#)) beginning with the lowest EFC ([TEC, Section 56.303\(e\)](#)).
  - Of the remaining eligible applicants that do not meet the Priority Model but do not exceed the Priority EFC, precedence goes to those who demonstrate the greatest financial need, defined as cost of attendance minus the calculated EFC ([TAC, Section 22.1\(14\)](#)).

For similarly situated applicants, the Priority Deadline ([TEC, Section 56.008](#)) is used as an additional determining factor.

**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 did 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 (Priority EFC and the Priority Model) for an IY TEXAS Grant and would thus take precedence over the student who exceeds the Priority EFC.

After all students meeting priority criteria are awarded, remaining funds may be offered to students who meet IY eligibility requirements and qualify through one of the four pathways:

- High School Graduation
- Associate Degree
- Honorable Military Discharge
- TEOG Transfer



### NEW SUMMER AWARDING

All basic eligibility requirements remain the same for summer terms, including the student's minimum enrollment status. Since summer terms vary in length and in the number of hours a student can enroll, summer terms or modules can be combined to establish the student's enrollment hours for eligibility purposes.

## SEMESTER MAXIMUM ([19 TAC, SECTION 22.234](#))

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 \$5,195 per semester.
- A student could receive up to \$15,585 for the 2021-22 award year.
- Target awards are still encouraged (\$2,500 per semester = up to \$7,500).

2021-22 AWARD MAXIMUMS				
Students may be issued a total of 3 awards (Fall, Spring, and Summer) in an academic year.				
INSTITUTION TYPE	SEMESTER MAX	YEAR MAX (Fall, Spring & Summer)	TARGET SEMESTER MAX	TARGET YEAR MAX (Fall, Spring & Summer)
PUBLIC UNIVERSITIES, HRIs	\$5,195	\$15,585	\$2,500	\$7,500

## PRIORITY MODEL CRITERIA ([19 TAC, SECTION 22.233](#))


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

## REQUIRED MATCHING ([19 TAC, SECTION 22.234](#))

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.”

## OVER AWARDS ([19 TAC, SECTION 22.11](#))

 **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.

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.

## AWARD ADJUSTMENTS ([19 TAC, SECTION 22.11](#))

Institutions may be required to make award adjustments in the following circumstances:

- Student officially withdraws from enrollment.
  - The institution must 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 their eligibility amount.
  - The institution must 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](#).



## PRORATION REQUIREMENT REMOVED

**In November 2020, TAC provisions pertaining to proration were removed.**

Proration requirements were removed to provide institutions with flexibility to address the needs of their student population and to eliminate an unnecessary level of complexity in the administration of the program.

**Institutions now have the discretion to determine grant amounts for previously prorated circumstances.**

**EXAMPLE: Semester Maximum = \$5,195**

- **Student A:** Student is enrolled less than 3/4 time due to a hardship circumstance:
  - award amount: **\$1 - \$5,195**
- **Student B:** The balance eligible program hours while receiving grant funds is less than the total number of hours the student is enrolled:
  - award amount: **\$1 - \$5,195**

**Alert:** The following sections related to proration from the **2020-21** Program Guidelines were removed:

- The student is enrolled less than 3/4 time but at least 1/2 time, with an extension of eligibility (due to a hardship circumstance). (Page 8 of the 2020-21 Guidelines)

### HARDSHIP PRORATION SCHEDULE

Divide the maximum award for the semester by 12 and multiply by the number of hours enrolled (6-8 hours)

- 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. (Page 8 of the 2020-21 Guidelines)

### BALANCE OF TOTAL ATTEMPTED HOURS (150 SCH)

### BALANCE OF ELIGIBLE PROGRAM HOURS (150 OR 60-21)

Balance of hours = 6-8 hours: 50% of the maximum award  
Balance of hours = 1-5 hours: 25% of the maximum award

## PROCESSING FUNDS

### REQUESTING AND RETURNING PROGRAM FUNDS

Institutions must submit a form online through the [Grant Payment System](#) application (app) to request or return funds.

- **Requesting Funds:** The institutions can begin submitting requests for funding on **August 2, 2021**. The THECB will begin processing funds *after September 1, 2021*. Institutions have *until* the close of business on **August 1, 2022** 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 ([19 TAC, SECTION 22.2](#))

Institutions **must** follow these requirements when processing program funds:

- 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 ([19 TAC, SECTION 22.11](#))

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.

### AUTHORITY TO TRANSFER FUNDS ([19 TAC, SECTION 22.11](#))

Institutions participating in a combination of Texas College Work-Study (TCWS) or Work-Study Student Mentorship Program (WSMP) and TEXAS Grant may transfer up to **10%** 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, 2022**. The Financial Aid Services staff will respond to the institution to provide next steps for the process.

 **ALERT NEW:** Effective for the 2021-22 award year, the allowable amounts for the Authority to Transfer Funds process have changed as a result of the 87th Legislative Session. Institutions participating in a combination of TCWS or Work-Study Student Mentorship Program (WSMP) and one of the three state grant programs (TEXAS Grant, TEOG, and TEG), may transfer up to **25%** of the institution's total annual program allocation or **\$60,000** (whichever is less) between programs within the relevant fiscal year. Administrative rules for the Authority to Transfer Funds are being updated and will be available in 2022 for [19 TAC, Section 22.11](#).



## 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.

**NEW:** Statutes (TEC) and rules (TAC) periodically change and may affect the links referenced in this document. Copies of statutes and rules used to create these guidelines are available in [Appendix 2](#).

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### PROGRAM AUTHORITY AND PURPOSE ([19 TAC, SECTION 22.253](#))

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.

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### 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.

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### ELIGIBLE INSTITUTIONS ([19 TAC, SECTION 22.255](#))

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 ([19 TAC, SECTION 22.256](#) AND [22.258](#))

TO RECEIVE AN INITIAL (IY) AWARD, A STUDENT MUST:	TO RECEIVE AN RENEWAL (RY) AWARD, A STUDENT MUST:
<ul style="list-style-type: none"> <li>✓ be classified by the institution as a Texas resident</li> <li>✓ be registered with Selective Service, or be exempt (See Selective Service Statement)</li> <li>✓ have applied for any available financial aid assistance</li> <li>✓ have financial need</li> <li>✓ be enrolled at least 1/2 time as an undergraduate student in an associate degree or certificate program at a 2-year institution</li> <li>✓ not have <b>attempted</b> more than 30 semester credit hours (SCH) (excluding credits for dual enrollment or by examination)</li> <li>✓ not have earned an associate or baccalaureate degree</li> <li>✓ not be concurrently receiving TEXAS Grant</li> <li>✓ 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 <a href="#">Chapter 481, Health and Safety Code</a> (Texas Controlled Substances Act)</li> </ul>	<ul style="list-style-type: none"> <li>✓ be classified by the institution as a Texas resident</li> <li>✓ be registered with Selective Service, or be exempt</li> <li>✓ be a previous TEOG initial award recipient</li> <li>✓ have financial need</li> <li>✓ be enrolled at least 1/2 time as an undergraduate student in an associate degree or certificate program at a 2-year institution</li> <li>✓ maintain satisfactory academic progress</li> <li>✓ not have earned an associate or baccalaureate degree</li> <li>✓ not be concurrently receiving TEXAS Grant</li> <li>✓ 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 <a href="#">Chapter 481, Health and Safety Code</a> (Texas Controlled Substances Act)</li> </ul>

## 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 2021-22 is **\$6,234**.

## CONTROLLED SUBSTANCE RESTRICTIONS ([19 TAC, SECTION 22.258](#))

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 they meets **all** other eligibility requirements and **one** of the following conditions exists:

- the student received a certificate of discharge by the Texas Department of Criminal Justice or a correctional facility, or 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
- 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 ([19 TAC, SECTION 22.256](#))

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** are 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 (**including dual credit**) 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 ([19 TAC, SECTION 22.259](#))

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) ([19 TAC, SECTION 22.257](#))

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 their 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.

## AWARDING

### PRIORITY AWARDING ([19 TAC, SECTION 22.260](#))

If allocated funds are insufficient to award all eligible students, below is the priority for awarding funds:

- Precedence goes to Renewal Year (RY) students over Initial Year (IY) students.
- Once all eligible RY students have been awarded, precedence goes to eligible IY applicants who do not exceed the Priority EFC.
  - At the time the award is made, highest priority goes to those who demonstrate the greatest financial need, defined as cost of attendance minus the calculated EFC ([TAC, Section 22.1\(14\)](#)).

### **NEW** SUMMER AWARDING

All basic eligibility requirements remain the same for summer terms, including the student's minimum enrollment status. Since summer terms vary in length and in the number of hours a student can enroll, summer terms or modules can be combined to establish the student's enrollment hours for eligibility purposes.

### SEMESTER MAXIMUM ([19 TAC, SECTION 22.261](#))

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.

2021-22 AWARD MAXIMUMS		
INSTITUTION TYPE	YEAR MAX	SEMESTER MAX
PUBLIC STATE COLLEGES	\$6,429	\$2,143
PUBLIC TECHNICAL INSTITUTES	\$9,714	\$3,238
PUBLIC COMMUNITY COLLEGES	\$5,133	\$1,711

#### **ALERT: Enrollment Status at Census Discontinued**

A student's enrollment status at census is no longer a determining factor when calculating the award amount (see [Proration Requirement Removed](#)).



## PRORATION REQUIREMENT REMOVED

In November 2020, TAC provisions pertaining to proration were removed.

Proration requirements were removed to provide institutions with the flexibility to address the needs of their student population and to eliminate an unnecessary level of complexity in the administration of the program.

Institutions now have discretion to determine grant amounts for previously prorated circumstances.

**EXAMPLE: Community College Semester Maximum = \$1,711**

- **Student A:** Enrolled in 12 SCH as of the fall census:
  - award amount: \$1 - \$1,711
- **Student B:** Enrolled in 6 SCH as of the fall census:
  - award amount: \$1- \$1,711
- **Student C:** Enrolled in 12 SCH with only 5 hours of TEOG eligibility remaining:
  - award amount: \$1 - \$1,711

**Alert:** The following sections related to proration from the 2020-21 Program Guidelines were removed:

- The recipient enrolled in less than full-time as of census date (Page 6 – Program Guidelines 2020-21).

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	\$1,490	\$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

- The recipient enrolled in less than half-time due to impending graduation or hardship (Page 7 – Program Guidelines 2020-21).


HARDSHIP PRORATION SCHEDULE	ENROLLED < 6 HOURS
	The maximum award for the semester divided by 12, prorated by the number of hours enrolled.

- The recipient's balance of eligible or attempted SCHs is less than the number of SCHs the student is taking in the given semester (Page 7 – Program Guidelines 2020-21).

BALANCE OF TOTAL ATTEMPTED HOURS	Balance = 9-12 hours: 75% of max award
BALANCE OF ELIGIBLE PROGRAM HOURS	Balance = 6-8 hours: 50% of the max award
	Balance = 1-5 hours: 25% of the max award

## REQUIRED MATCHING ([19 TAC, SECTION 22.261](#))

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.

## OVER AWARDS ([19 TAC, SECTION 22.11](#))

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.

## AWARD ADJUSTMENTS ([19 TAC, SECTION 22.11](#))

Institutions may be required to make award adjustments in the following circumstances:

When a student officially withdraws from enrollment:

- The institution must 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.

When a student’s disbursement exceeds their eligibility amount:

- The institution must 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](#).

## 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.

- **Requesting Funds:** Institutions can begin submitting requests for funding on **August 2, 2021**. The THECB will begin processing funds *after* **September 1, 2021**. Institutions have *until* the close of business on **August 1, 2022** 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 ([19 TAC, SECTION 22.261](#))

Institutions **must** follow these requirements when processing program funds:

- 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 ([19 TAC, SECTION 22.11](#))

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.

### AUTHORITY TO TRANSFER FUNDS ([19 TAC, SECTION 22.11](#))

Institutions participating in a combination of Texas College Work-Study (TCWS) or Work-Study Student Mentorship Program (WSMP) and TEOG may transfer up to **10%** 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, 2022**. The Financial Aid Services staff will respond to the institution to provide next steps for the process.



**ALERT NEW:** Effective for the 2021-22 award year, the allowable amounts for the Authority to Transfer Funds process have changed as a result of the 87th Legislative Session. Institutions participating in a combination of TCWS or Work-Study Student Mentorship Program (WSMP) and one of the three state grant programs (TEXAS Grant, TEOG, and TEG), may transfer up to **25%** of the institution's total annual program allocation or **\$60,000** (whichever is less) between programs within the relevant fiscal year. Administrative rules for the Authority to Transfer Funds are being updated and will be available in 2022 for [19 TAC, Section 22.11](#).



## 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.

**NEW:** Statutes (TEC) and rules (TAC) periodically change and may affect the links referenced in this document. Copies of statutes and rules used to create these guidelines are available in [Appendix 2](#).

### PROGRAM AUTHORITY AND PURPOSE ([19 TAC, SECTION 22.21](#))

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 ([19 TAC, SECTION 22.23](#))

Any colleges or universities, defined in [TEC, Section 61.003\(15\)](#) as a private or independent institution of higher education, are invited annually to participate in the TEG allocation process. Those choosing not to participate will not be considered in the allocation calculation for the applicable award year. Institutions that participate will have a single allocation in which first and subsequent awards can be made.



## ELIGIBILITY

### ELIGIBILITY REQUIREMENTS ([19 TAC, SECTION 22.24](#))

#### TO RECEIVE A FIRST AWARD, A STUDENT MUST:

- ✓ be classified by the institution as a Texas resident
- ✓ be registered with Selective Service, or be exempt (see [Appendix 1](#))
- ✓ 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](#))

### DISCONTINUATION OF ELIGIBILITY ([19 TAC, SECTION 22.26](#))

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 ([19 TAC, SECTION 22.27](#))

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) ([19 TAC, SECTION 22.25](#))

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 – <b>UNDERGRADUATE STUDENTS</b>	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 – <b>GRADUATE STUDENTS</b>	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.

## 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.

### **UPDATED: Enrollment in Degree Programs Leading to Religious Ministry (19 TAC, SECTION 22.22(8))**

Any enrollment in a degree program *leading to religious ministry*, 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.

**NOTE:** The THECB does not approve degree plans for TEG award eligibility. Institutions will determine if the student's degree plan is intended to lead to religious ministry.

### **NEW SUMMER AWARDING**

All basic eligibility requirements remain the same for summer terms, including the student's minimum enrollment status. Since summer terms vary in length and in the number of hours a student can enroll, summer terms or modules can be combined to establish the student's enrollment hours for eligibility purposes.

### **ANNUAL MAXIMUM (19 TAC, SECTION 22.28)**

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

- A student may receive up to the annual maximum amount of \$3,497 (Undergraduates with exceptional need may receive up to \$5,246).
- Total awards for fall, spring, and summer terms cannot exceed the **annual** maximum.
- TEG does **NOT** have a semester maximum.

#### 2021-22 AWARD MAXIMUMS

Total awards for fall, spring, and summer terms cannot exceed the annual maximum.

INSTITUTION TYPE	AWARD MAX PER YEAR	EXCEPTIONAL NEED AMOUNT PER YEAR
PRIVATE/INDEPENDENT INSTITUTIONS	\$3,497	\$5,246

Undergraduate students whose EFCs are ≤ \$1,000 may receive up to the Exceptional Need award amount.

## TUITION DIFFERENTIAL ([19 TAC, SECTION 22.22](#))

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.

The following table shows average resident undergraduate and graduate tuition rates per SCH for public institutions at various SACS levels for the 2021-22 academic year. These amounts should be used by the institution to derive tuition differentials by using the student’s total SCH and multiplying the tuition rate provided (see **Appendix 2** for individual institutional program levels).

SACS LEVEL	UNDERGRADUATE TUITION RATE PER SCH	GRADUATE TUITION RATE PER SCH
ASSOCIATE DEGREE <b>LEVEL 1</b>	\$67	n/a
BACCALAUREATE DEGREE <b>LEVEL 2</b>	\$58	n/a
MASTER’S DEGREE <b>LEVEL 3</b>	\$200	\$282
THREE OR FEWER DOCTORAL DEGREES <b>LEVEL 5</b>	\$207	\$260
FOUR OR MORE DOCTORAL DEGREES <b>LEVEL 6</b>	\$257	\$343
PUBLIC INSTITUTION RATES FOR LAW SCHOOL STUDENTS = \$959 PER SCH		

## OVER AWARDS ([19 TAC, SECTION 22.11](#))

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.

## AWARD ADJUSTMENTS ([19 TAC, SECTION 22.11](#))

Institutions may be required to make award adjustments in the following circumstances:

- 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](#).

## 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 = \$515
- Institution SACS Level 5 = \$200
- Undergraduate student is enrolled in 12 SCH for fall and 15 SCH for spring.

### To calculate tuition differential:

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

### For Example:

\$515 - \$200 = \$315  
\$315 x 27 SCH = \$8,505

This student is eligible for a TEG award since the tuition differential (\$8,508) is more than the maximum award (\$3,420).



## PRORATION REQUIREMENT REMOVED

**In November 2020, TAC provisions pertaining to proration were removed.**

Proration requirements were removed to provide institutions with flexibility to address the needs of their student population and to eliminate an unnecessary level of complexity in the administration of the program.

**Institutions now have the discretion to determine grant amounts for previously prorated circumstances.**

**EXAMPLE: Annual Maximum = \$3,497 or up to \$5,246 (undergraduates with exceptional need)**

- **Student A:** Undergraduate student is enrolled less than 3/4 time due to a hardship circumstance:
  - award amount: \$1 - \$3,497 or up to \$5,246 (those with exceptional need)
- **Student B:** Graduate student is enrolled less than 3/4 time due to a hardship circumstance:
  - award amount: \$1 - \$3,497

**NOTE:** Total awards for fall, spring, and summer terms cannot exceed the annual maximum.



**Alert:** The following sections related to proration from the **2020-21** Program Guidelines was removed:

- 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 4-5 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](#) application (app) to request or return funds.

- **Requesting Funds:** Institutions can begin submitting requests for funding on **August 2, 2021**. The THECB will begin processing funds *after* **September 1, 2021**. Institutions have *until* the close of business on **August 1, 2022** 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 ([19 TAC, SECTION 22.2](#))

Institutions **must** follow these requirements when processing program funds:

- 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 ([19 TAC, SECTION 22.11](#))

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.

### AUTHORITY TO TRANSFER FUNDS ([19 TAC, SECTION 22.11](#))

Institutions participating in a combination of Texas College Work-Study (TCWS) or Work-Study Student Mentorship Program (WSMP) and TEG may transfer up to **10%** 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, 2022**. The Financial Aid Services staff will respond to the institution to provide next steps for the process.

 **ALERT NEW:** Effective for the 2021-22 award year, the allowable amounts for the Authority to Transfer Funds process have changed as a result of the 87th Legislative Session. Institutions participating in a combination of TCWS or Work-Study Student Mentorship Program (WSMP) and one of the three state grant programs (TEXAS Grant, TEOG, and TEG), may transfer up to **25%** of the institution's total annual program allocation or **\$60,000** (whichever is less) between programs within the relevant fiscal year. Administrative rules for the Authority to Transfer Funds are being updated and will be available in 2022 for [19 TAC, Section 22.11](#).



## 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.

**NEW:** Statutes (TEC) and rules (TAC) periodically change and may affect the links referenced in this document. Copies of statutes and rules used to create these guidelines are available in [Appendix 2](#).

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### PROGRAM AUTHORITY AND PURPOSE ([19 TAC, SECTION 22.127](#))

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.

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### 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.

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### ELIGIBLE INSTITUTIONS ([19 TAC, SECTION 22.129](#))

Any public, private, or independent institution of higher education as defined in [TEC, Section 61.003](#), except a theological or religious seminary institution, are invited annually to participate in the TCWS allocation process. Those choosing not to participate will not be considered in the allocation calculation for the applicable award year.

## ELIGIBILITY

### ELIGIBILITY REQUIREMENTS ([19 TAC, SECTION 22.130](#))


#### 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 (see [Appendix 1](#))
- ✓ 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 ([19 TAC, SECTION 22.129](#) AND [22.131](#))

Participating institutions may enter into agreements with off-campus employers to participate in the TCWS Program or provide on-campus employment. To be eligible to participate, an employer or the institution must:

- provide part-time employment to an eligible student in nonpartisan and nonsectarian 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
- provide certain wage and employee benefits (See [Required Matching](#))

 **ALERT:** Beginning with the 2020-21 academic year, institutions are **no longer required** to provide any off-campus positions.

## ADDITIONAL INFORMATION

### NON-TEXAS RESIDENT STUDENTS

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

### NON-CITIZEN STUDENTS

A Texas affidavit (non-citizen) 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\(a\)\(1\)](#)).



## AWARDING

A TCWS award, which includes state and employer matching funds, cannot exceed the student's calculated need. Institutions that annually choose to participate in TCWS are provided an allocation of funds for student employment during the applicable academic year.

**Alert:** Beginning with the 2020-21 award year, institutions that do not utilize their original state work-study allocation during the nine-month academic year are permitted by the THECB to use funds for **summer awards**. Institutions may also use funds for summer awards if a reallocation is offered during the academic year. All funds must be expended by **August 31** of the current fiscal year (see [TAC, Section 22.133](#)).

### REQUIRED MATCHING ([19 TAC, SECTION 22.131](#))

Participating **for-profit** employers must:

- provide at least 50% of an employed student's wages and 100% of other employee benefits for the employed student

Participating **non-profit** employers must:

- provide at least 25% of an employed student's wages and 100% of other employee benefits for the employed student from sources other than federal college work-study program funds

Participating **Institutions** must:

- provide at least 25% of an employed student's wages and 100% of other employee benefits for the employed student from sources other than federal college work-study program funds

**NOTE:** Institutions that are eligible for Title III funds from the U.S. Department of Education (ED) are **exempt** from the requirement to provide 25% 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, upon request.



### AWARD ADJUSTMENTS AND OVER AWARDS REQUIREMENT REMOVED

In November 2020, TAC provisions pertaining to award adjustments and over awards were updated and no longer pertain to Texas College Work-Study programs.

Language in 19 TAC, Section 22.11 (d) and (e) was updated to apply to grant programs only. Unlike state grant programs, work-study funds are paid based on hours earned and therefore awards are not eligible for adjustments.

**Alert:** The following sections from the **2020-21** Program Guidelines were removed:

#### AWARD ADJUSTMENTS ([19 TAC SECTION, 22.11](#))

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 their eligibility amount.
  - Recalculate eligibility.

#### OVER AWARDS ([19 TAC SECTION, 22.11](#))

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 ([19 TAC, SECTION 22.133](#))

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.

### AUTHORITY TO TRANSFER FUNDS ([19 TAC, SECTION 22.11](#))

Institutions participating in a combination of TCWS or Work-Study Student Mentorship Program (WSMP) and one of the three state grant programs (TEXAS Grant, TEOG, and TEG), may transfer up to **10%** of the institution's total annual program allocation or **\$20,000** (whichever is less) between programs within the relevant fiscal year.

**NEW:** Institutions participating in both the TCWS and Work-Study Student Mentorship Program (WSMP) may transfer up to 25% between the two programs. This threshold applies to the program from which the funds are transferred.

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, 2022**. The Financial Aid Services staff will respond to the institution to provide next steps for the process.



**ALERT NEW:** Effective for the 2021-22 award year, the allowable amounts for the Authority to Transfer Funds process have changed as a result of the 87th Legislative Session. Institutions participating in a combination of TCWS or Work-Study Student Mentorship Program (WSMP) and one of the three state grant programs (TEXAS Grant, TEOG, and TEG), may transfer up to **25%** of the institution's total annual program allocation or **\$60,000** (whichever is less) between programs within the relevant fiscal year. Administrative rules for the Authority to Transfer Funds are being updated and will be available in 2022 for [19 TAC, Section 22.11](#).



## 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.

**NEW:** Statutes (TEC) and rules (TAC) periodically change and may affect the links referenced in this document. Copies of statutes and rules used to create these guidelines are available in [Appendix 2](#).

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### PROGRAM AUTHORITY AND PURPOSE ([19 TAC, SECTION 22.127](#))

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 22, Subchapter G](#). The purpose of WSMP 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 and increase student access, success, and completion of higher education and to provide employed WSMP students with an opportunity to gain and strengthen career readiness skills. These student mentor, tutor, and advising positions are funded by a combination of state appropriations provided by the Texas College Work-Study (TCWS) Program and matching funds from participating institutions.

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### ELIGIBLE INSTITUTIONS ([19 TAC, SECTION 22.129](#))

Any public, private, or independent institutions of higher education as defined in [TEC, Section 61.003](#), except theological or religious seminary institutions, are invited annually to participate in the WSMP allocation process. Those choosing not to participate will not be considered in the allocation calculation for the applicable award year. Independent institutions of higher education offering only professional or graduate degrees are **NOT** eligible to participate in the WSMP.

## PROGRAM PARTICIPATION REQUIREMENTS

### INSTITUTION REQUIREMENTS ([19 TAC, SECTION 22.130](#))

To participate in the WSMP, an eligible institution must establish a Work-Study Student Mentorship Program designed to improve and increase student access, success, and completion of higher education and provide employed WSMP students with an opportunity to gain and strengthen future career readiness skills. Programs must be structured to offer on-campus or off-campus mentoring, tutoring, or advising services. Institutions 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 before 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 and Participating Institutions
- program oversight
- matching funds, including partner match (see [Required Matching](#) section)

### TRAINING REQUIREMENTS ([19 TAC, SECTION 22.130](#))

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 career readiness 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 overview of ADVi, a chatbot that uses artificial intelligence to provide support to Texans looking to attend or return to higher education.

## 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.
- Encourage and assist students in their interactions with ADVi to help guide them through the college process.



**STOP:** To best understand the role and capabilities of **ADVi**, the THECB Virtual Advising Project will provide a demonstration of the chatbot. Please go to [askAdvi](#) and follow the steps under "Accessing ADVi" to request a demonstration.

## ELIGIBILITY

### ELIGIBILITY REQUIREMENTS ([19 TAC, SECTION 22.129](#))

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



**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 between participating Higher Education Institutions and the THECB.

The following program administration areas are overseen by the financial aid office:

- State Priority Deadline
- Selective Service Statement
- Calculating Award Amounts

## ADDITIONAL INFORMATION

### NON-TEXAS RESIDENT STUDENTS

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

### NON-CITIZEN STUDENTS

A Texas affidavit (non-citizen) 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.

## 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.

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

**Financial Need** is defined as the cost of attendance (COA) minus the expected family contribution (EFC) ([see 19 TAC, Section 22.1](#)).

**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 this example, the student has no financial need and is not eligible for a WSMP award for the academic year.



## AWARD ADJUSTMENTS AND OVER AWARD REQUIREMENT REMOVED

In November 2020, TAC provisions pertaining to award adjustments and over awards were updated and no longer pertain to Texas College Work-Study programs.

Language in [19 TAC, Section 22.11 \(d\) and \(e\)](#) was updated to apply to grant programs only. Unlike state grant programs, work-study funds are paid based on hours earned and therefore awards are not eligible for adjustments.

**Alert:** The following sections from the 2020-21 Program Guidelines were removed:

### AWARD ADJUSTMENTS ([19 TAC SECTION, 22.11](#))

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 determines their eligibility amount.
  - Recalculate eligibility amount.

### OVER AWARDS ([19 TAC SECTION, 22.11](#))

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 Biennium

#### FY 2022:


- State fiscal year begins September 1, 2021 and ends August 31, 2022.
- Unexpended FY 2022 funds can be *carried forward* into FY 2023.
- Unexpended FY 2022 funds **CANNOT** be *carried forward* into FY 2024.

**NOTE:** A *biennium* is defined as a two-year state budget period. Any carry-forward funds not expended in the second year of the biennium must be returned to the THECB.

## REQUIRED MATCHING ([19 TAC, SECTION 22.129](#))

Participating institutions must provide at least a 10% match of a WSMP-employed student's wages. In addition, institutions are required to fund 100% 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 (see [Reporting Requirements](#)).

 **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% match of a WSMP-employed student's wages.

## AUTHORITY TO TRANSFER FUNDS ([19 TAC, SECTION 22.11](#))

Institutions participating in a combination of Work-Study Student Mentorship Program (WSMP) and one of the three state grant programs (TEXAS Grant, TEOG, and TEG), may transfer up to **10%** of the institution's total annual program allocation or **\$20,000** (whichever is less) between programs within the relevant fiscal year.

**NEW:** Institutions participating in both the WSMP and TCWS may transfer up to 25% between the two programs. This threshold applies to the program from which the funds are transferred.

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, 2022**. The Financial Aid Services staff will respond to the institution to provide next steps for the process.

 **ALERT NEW:** Effective for the 2021-22 award year, the allowable amounts for the Authority to Transfer Funds process have changed as a result of the 87th Legislative Session. Institutions participating in a combination of TCWS or Work-Study Student Mentorship Program (WSMP) and one of the three state grant programs (TEXAS Grant, TEOG, and TEG), may transfer up to **25%** of the institution's total annual program allocation or **\$60,000** (whichever is less) between programs within the relevant fiscal year. Administrative rules for the Authority to Transfer Funds are being updated and will be available in 2022 for [19 TAC, Section 22.11](#).



## 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 the authority to gather, review, and report to the THECB appropriate data from all partners for evaluation purposes.



**ALERT NEW REPORTING PROCESS:** Beginning June 5, 2021, WSMP institutions will submit program progress reports and applicable supplemental documents (e.g., Title III Waiver, Off-Campus MOU) through a WSMP Online Report Portal.

- WSMP institutions are no longer required to submit reports through the MOVEit system.
- Reporting templates provided on [Appendix 1](#) can be now used as a resource in preparation for portal submission.

Each institution designates a WSMP Online Report Portal account holder who will be responsible for submitting the required program progress reports. Portal account set up, instructions on how the portal functions, and how to submit report data are provided within the [WSMP Online Report Portal Instructions](#) resource section.

To meet the reporting requirements, institutions must submit a **Financial Report** and an **Annual Outcome Report** that collects aggregate information. The **Annual Outcome Report** includes a program overview, type of activities implemented, and Persistence Data.

**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 Outcome Report		
Report	Reporting Period	Due Date
<ul style="list-style-type: none"> <li>• Financial Report               <ul style="list-style-type: none"> <li>○ Upload Title III Eligibility Letter if applicable</li> </ul> </li> </ul>	September 1 - May 31, 2022	June 5, 2022
<ul style="list-style-type: none"> <li>• Financial Report</li> <li>• Annual Outcome Report               <ul style="list-style-type: none"> <li>○ Upload Off-Campus MOU if applicable</li> </ul> </li> </ul>	September 1 - August 31, 2022	September 5, 2022

**Note:** Failure to meet the program reporting requirements may result in the loss of funding.



**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.



## 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.

**NEW:** Statutes (TEC) and rules (TAC) periodically change and may affect the links referenced in this document. Copies of statutes and rules used to create these guidelines are available in [Appendix 2](#).

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### PROGRAM AUTHORITY AND PURPOSE ([19 TAC, SECTION 22.42](#))

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 ([19 TAC, SECTION 22.45](#))

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](#)
- regional education service centers or other entities that offers an alternative educator certification program approved by the State Board for Educator Certification as defined in [TEC, Section 21.049](#)

## ELIGIBILITY

### ELIGIBILITY REQUIREMENTS ([19 TAC, SECTION 22.46](#) & [22.47](#))

STUDENTS MUST MEET THE FOLLOWING:	COSIGNERS MUST MEET THE FOLLOWING:
<ul style="list-style-type: none"> <li>✓ be classified by the institution as a Texas resident</li> <li>✓ be registered with Selective Service, or be exempt (see <a href="#">Appendix 1</a>)</li> <li>✓ have insufficient resources to finance their education</li> <li>✓ be enrolled at least half-time as determined by the institution in a course of study leading to a certificate, an associate, baccalaureate, graduate or higher degree, <b>or</b> an approved alternative educator certification program</li> <li>✓ meet the satisfactory progress (SAP) requirements set by the institution</li> <li>✓ receive a favorable credit evaluation or provide a cosigner who has a good credit standing and meets other requirements</li> </ul>	<ul style="list-style-type: none"> <li>✓ be at least 21 years of age</li> <li>✓ have a regular source of income</li> <li>✓ not be the borrower or the spouse of the borrower</li> <li>✓ receive a favorable credit evaluation</li> <li>✓ be a U.S. citizen or a permanent U.S. resident and reside in the U.S. or in a U.S. territory</li> </ul>
	<b>STUDENTS AND COSIGNERS MUST MEET THE FOLLOWING CREDIT APPROVAL REQUIREMENTS:</b> <ul style="list-style-type: none"> <li>✓ have an Experian VantageScore of 650 or higher</li> <li>✓ not have public records such as tax liens or bankruptcy proceedings</li> <li>✓ have a minimum of 4 credit trade lines, excluding student loans or authorized user accounts</li> <li>✓ not have defaulted on any federal or private education loans</li> </ul>

### SATISFACTORY ACADEMIC PROGRESS (SAP) ([19 TAC, SECTION 22.46](#))

A student must meet 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.

## ADDITIONAL INFORMATION

### CAL INTEREST RATE CHANGE

Effective July 1, 2021, CAL carries a fixed annual interest rate of 3.75%.

### 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.

## AWARDING

### AWARD AMOUNTS ([19 TAC, SECTION 22.49](#))

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.

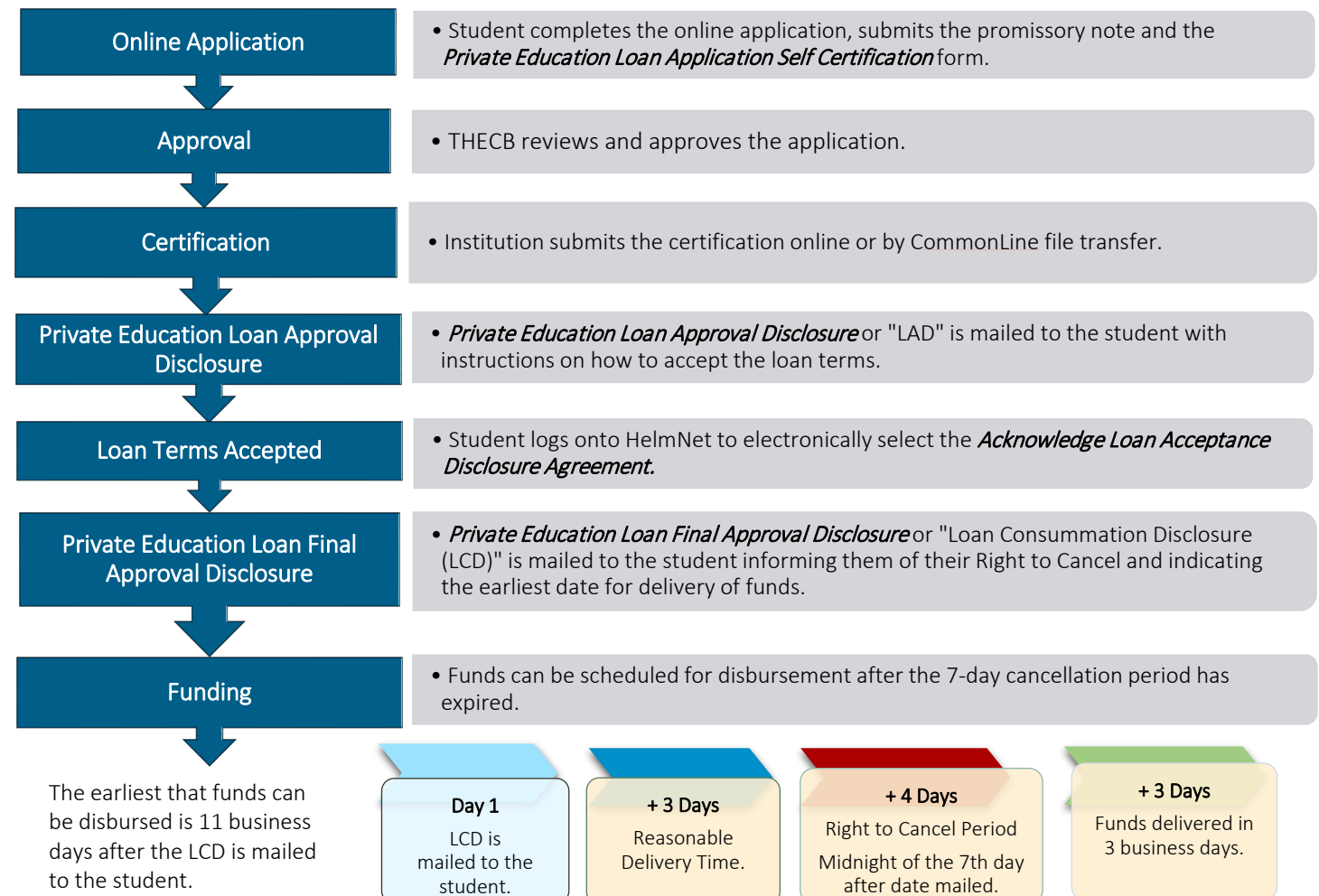
Eligibility for Federal PLUS loans should not be considered when determining the amount of a CAL.

**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). (See [19 TAC, Section 22.46\(b\)](#))

## PROCESSING FUNDS

### LOAN PROCESS FLOW

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



## 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 portal](#)
- 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.

**New** The institution can make certain predisbursement changes (see [HelmNet Change Transactions Instruction Guide](#)) through the HelmNet Portal or request changes such as reinstatement in writing through [CONTACT US](#). Loans can be increased or reinstated up to the original certification amount. 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 their 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.

## ADDITIONAL INFORMATION

### HELMNET 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 [User Access 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.



### STOP: REINSTATING CANCELED LOANS

Institutions can send a request in writing through [CONTACT US](#) to reinstate a canceled loan or disbursement. Requests will be reviewed on a case-by-case basis.

#### 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.

## 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)

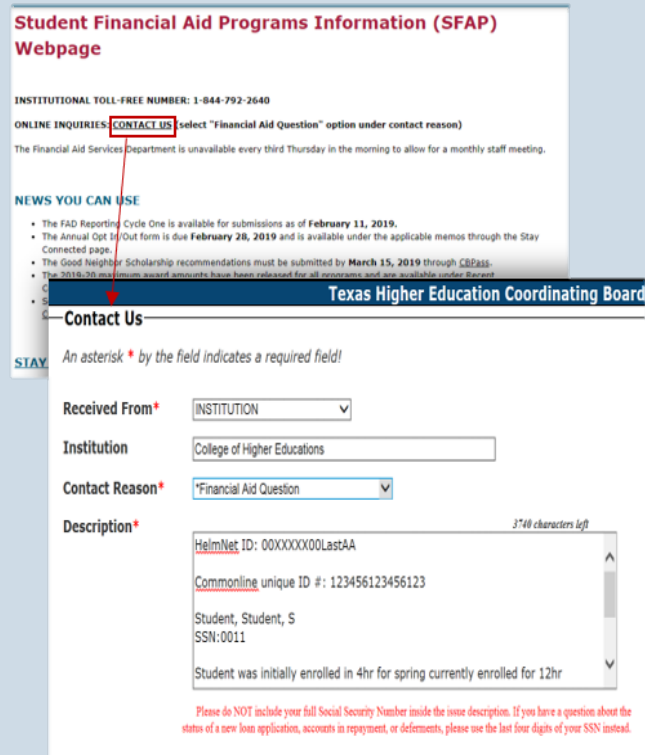
Enter the following information in the Description box:

- requestor's HelmNet portal ID (Username)
- CommonLine Unique ID #: (16 Characters)
- student's first name, last name, and middle initial
- last four digits of the student's SSN

**Note:** For security purposes, do NOT provide the student's full SSN when submitting online inquiries.

Provide a detailed explanation of the change needed:

- **Unclear request:** "Please reinstate the loan."
- **Clear request:** "Please reinstate the loan. The student's SAP appeal has been granted and the student is now eligible."



**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 Scholarship recommendations must be submitted by **March 15, 2019** through CBEass.
- The 2018-2019 minimum award amounts have been released for all programs and are available under **Barred**.

**Texas Higher Education Coordinating Board**

**Contact Us**

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

**Received From\*** INSTITUTION

**Institution** College of Higher Educations

**Contact Reason\*** \*Financial Aid Question

**Description\*** 3748 characters left

HelmNet ID: 00XXXXXX00LastAA

Commonline unique ID #: 123456123456123

Student, Student, S  
SSN:0011

Student was initially enrolled in 4hr for spring currently enrolled for 12hr

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.

## TIMELY DISTRIBUTION OF FUNDS ([19 TAC, SECTION 22.2](#))

Institutions **must** follow these requirements when processing program funds:

- 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 six-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 six-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 or Automatic Clearinghouse (ACH) payment service will receive a 0.25% interest rate reduction on the interest rate of each applicable loan in repayment.



### **STOP: 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 (loans types 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.



## 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.

**NEW:** Statutes (TEC) and rules (TAC) periodically change and may affect the links referenced in this document. Copies of statutes and rules used to create these guidelines are available in [Appendix 2](#).

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### PROGRAM AUTHORITY AND PURPOSE ([19 TAC, SECTION 22.163](#))

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.

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### ELIGIBLE INSTITUTIONS ([19 TAC, SECTION 22.164](#))

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 ([19 TAC, SECTION 22.166](#) AND [22.167](#))

The governor, lieutenant governor, state senators, and state representatives have until **August 31, 2021** 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 (see [Appendix 1](#))
- ✓ 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. (See [19 TAC, Section 22.166 \(d\)](#))

### PROMISSORY NOTE ([19 TAC, SECTION 22.168](#))

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

## ADDITIONAL INFORMATION

### TASSP NOMINATION 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, 2021**.

- 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 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
  - 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
- 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 ([19 TAC, SECTION 22.165](#))

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

[19 TAC, Section 22.166 \(e\)](#)

#### 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

### AWARD AMOUNT ([19 TAC, SECTION 22.165](#))

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**.

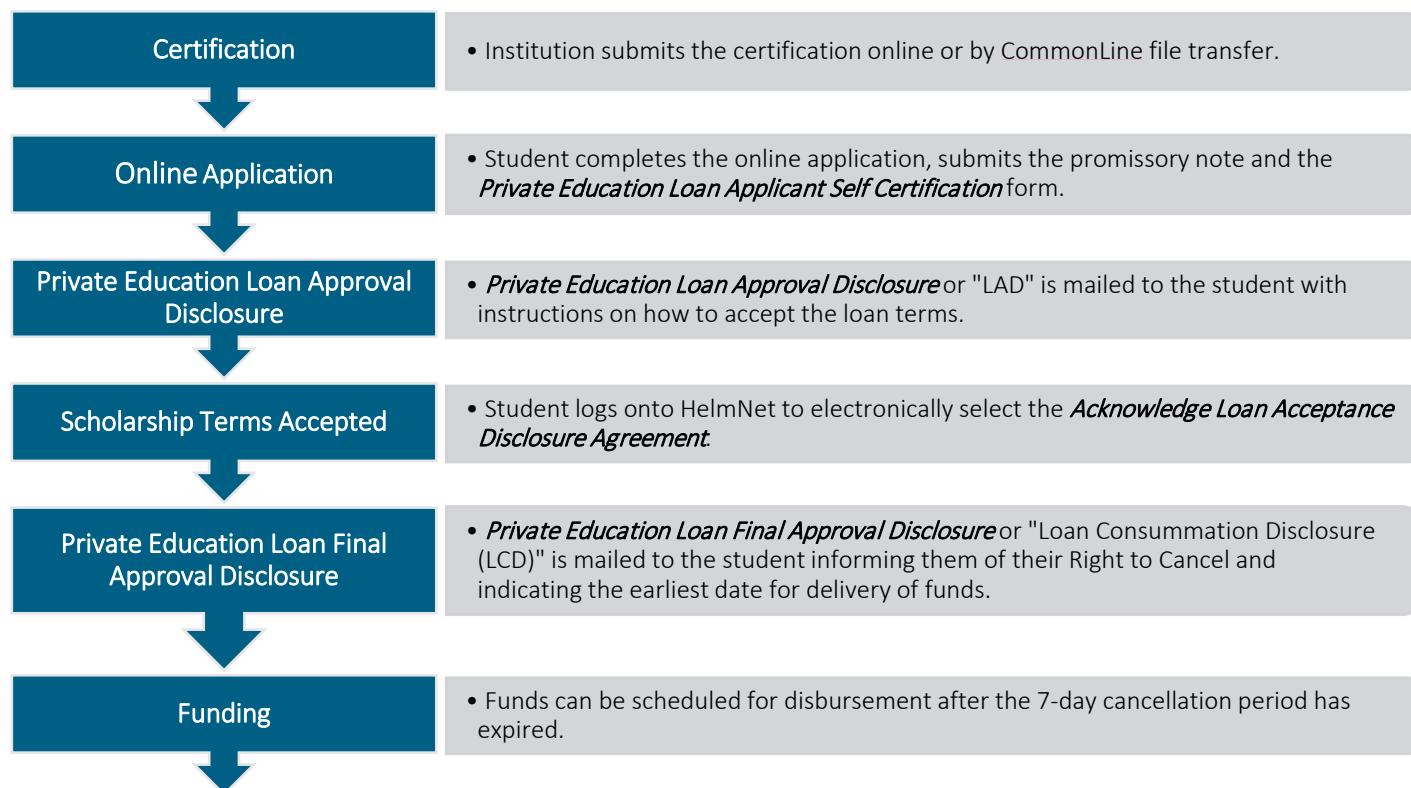
Institution Type	2021-22 Scholarship Maximum
Public and Private Institutions	\$10,000

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.

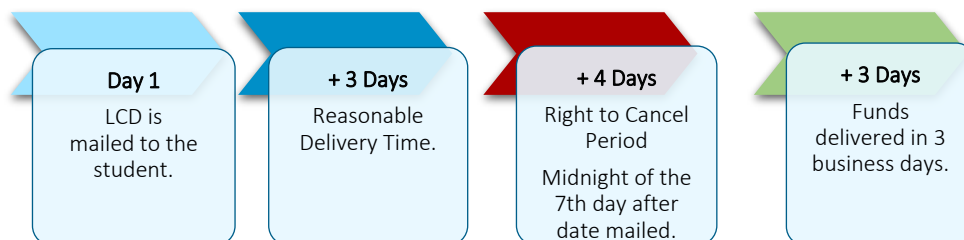
## PROCESSING FUNDS

### 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 the student.



## CERTIFYING FUNDS

Institutions have until **October 15, 2021** 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](#)
- submit a CommonLine Certification File using the [MOVEit DMZ](#) secure file transfer portal



**STOP:** Institutions must submit a [User Access Form](#) to request, update, or remove access to the HelmNet portal.

## RETURNING PROGRAM FUNDS

A [Return of Funds Form \(RFF\)](#) must be submitted before any funds are returned to the THECB.

## TIMELY DISTRIBUTION OF FUNDS (19 TAC, SECTION 22.2)

Institutions **must** follow these requirements when processing program funds.

- 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:

- 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:

- requestor's HelmNet portal ID (Username)
- CommonLine Unique ID #: (16 Characters)
- student's first name, last name, and middle initial
- last four digits of the student's SSN

**Note:** For security purposes, do NOT provide the student's SSN when submitting online inquiries.

Provide a detailed explanation of the change needed:

- **Unclear request:** "Please update scholarship disbursement to 02-01-2022."
- **Clear request:** "Please update scholarship disbursement #3 from 12-15-2021 to 02-01-2022."

**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 Scholarship recommendations must be submitted by **March 15, 2019** through CBPass.
- The 2019-20 minimum award amounts have been released for all programs and are available under Enroll.

**Texas Higher Education Coordinating Board**

**Contact Us**

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

Received From\*

Institution

Contact Reason\*

Description\*   
Commonline unique ID #: 123456123456123  
Student, Student, S  
SSN: 0011  
Student was initially enrolled in 4hr for spring currently enrolled for 12hr

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 ([19 TAC, SECTION 22.170](#))

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
  - 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 12 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 ([19 TAC, SECTION 22.171](#))

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

- The student will have a six-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% of the scheduled monthly payment or \$5, 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.

# Appendices



## APPENDIX 1: Selective Service Statement ([19 TAC, Section 22.3](#))

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).
- **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.
- **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](#).
- **When the student completes a Texas Application for State Financial Aid (TASFA):** The required statement is embedded in the TASFA and must be completed by the student.
- 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](#))

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.  
For more information about Selective Service System, visit [sss.gov](#).

<input type="checkbox"/> I am under the age of 18 and not currently required to register.	
<input type="checkbox"/> I am <b>REGISTERED</b> 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. <b>NOTE:</b> Proof is required to be considered eligible for financial aid.	<input type="checkbox"/> I am <b>EXEMPT</b> 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. <b>NOTE:</b> 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. <b>NOTE:</b> Choosing this option may result in the loss of eligibility for state financial aid.	
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.

## APPENDIX 2: TAC and TEC Archive

### CONTACT FINANCIAL AID SERVICES

By phone: (844) 792-2640

Contact us by completing an [online inquiry form](#) and select "Financial Aid Question" as the Contact Reason.

### PROGRAM RULES AND STATUTES

Texas Program Statutes	<a href="#">Texas Education Code</a>
Texas Program Rules and Statutes	<a href="#">Texas Administrative Code</a> <a href="#">19 TAC, Chapter 22, Subchapter A [PDF]</a>
TEXAS Grant Program Rules and Statutes	<a href="#">TEC, Chapter 56, Subchapter M [PDF]</a> <a href="#">19 TAC, Chapter 22, Subchapter L [PDF]</a>
TEOG	<a href="#">TEC, Chapter 56, Subchapter P [PDF]</a> <a href="#">19 TAC, Chapter 22, Subchapter M [PDF]</a>
TEG	<a href="#">TEC, Chapter 56, Subchapter B [PDF]</a> <a href="#">19 TAC, Chapter 22, Subchapter F [PDF]</a>
TEXAS College Work-Study and Work-Study Mentorship Program Rules and Statutes	<a href="#">TEC, Chapter 56, Subchapter G [PDF]</a> <a href="#">19 TAC, Chapter 22, Subchapter E [PDF]</a>
CAL	<a href="#">TEC, Chapter 52, Subchapter C [PDF]</a> <a href="#">19 TAC, Chapter 22, Subchapter C [PDF]</a>
TASSP	<a href="#">TEC, Chapter 56, Subchapter E [PDF]</a> <a href="#">19 TAC, Chapter 22, Subchapter G [PDF]</a>
Educational Aid	<a href="#">TEC, Chapter 54, Subchapter D [PDF]</a> <a href="#">19 TAC, Chapter 21, Subchapter II [PDF]</a>
Bilingual Education Scholarship	<a href="#">Bilingual Education Rider [PDF]</a>



## APPENDIX 3: TEXAS GRANT FREQUENTLY ASKED QUESTIONS

### 1. Can a student taking fewer than 6 semester credit hours (SCH) be approved by the institution to receive a TEXAS grant award through a hardship decision?

No, a student enrolled in fewer than 6 semester credit hours (SCH) cannot receive a TEXAS Grant award. There are no exceptions or hardship provisions that would allow this rule to be overridden.

### 2. Do transfer hours count when determining TEXAS Grant renewal eligibility?

Transfer hours are counted only if they are accepted by the receiving institution and are applied toward the student's current program of study.

### 3. Do institutions count dual credit hours when determining TEXAS Grant renewal eligibility?

Yes, dual credit hours are counted when determining eligibility for a renewal award if they are accepted by the receiving institution and are applied toward the student's current program of study. Dual credit hours are not counted when determining eligibility for an **initial award** as an entering undergraduate.

### 4. How can an institution determine if an online virtual high school graduate is eligible to receive an initial TEXAS Grant?

Based on program rules, a student must have graduated from an accredited public or private high school in Texas to be considered eligible for an initial TEXAS Grant award. To determine eligibility, the institution would need to verify its accreditation through Texas Education Agency (TEA) or the Texas Private School Accreditation Commission.

### 5. How long does an institution have to return TEXAS Grant funds after determining a student is ineligible?

An institution must return funds to the THECB within 45 calendar days of a student becoming ineligible for the funding, except when the funds can be disbursed to a different eligible student (for whom funds have not yet been requested) within the 45-day period.

NOTE: If funds are disbursed after the end of a student's period of enrollment, the funds must be used to pay the student's outstanding balance at the institution or to make a payment on an outstanding student loan for that period. Under no circumstances are funds to be released to the student.

### 6. Can an institution continue to prorate awards now that the Texas Administrative Code provisions were removed?

Yes, institutions can continue prorating awards but are **no longer required**. Institutions now have the discretion to determine grant amounts if the student meets all eligibility criteria.

## APPENDIX 4: TEOG FREQUENTLY ASKED QUESTIONS

### 1. Can Pell Grant be considered federal non-loan matching funds if the TEOG award amount is not enough to cover the cost of tuition and required fees?

No, institutions must use any non-loan programs from federal, state, institutional or outside sources but Pell grant is excluded as a matching source based on statute and program rule (e.g., Federal Supplemental Educational Opportunity Grant (FSEOG) or Texas Public Educational Grant (TPEG)).

### 2. Can a student enrolled only in Continuing Education Units (CEU) be eligible for a TEOG award?

No, to be eligible for TEOG funds, a student must be enrolled in courses that lead to an associate degree or certificate program.

### 3. Do institutions count dual credit hours when determining TEOG renewal eligibility?

Yes, dual credit hours are counted when determining eligibility for a renewal award if they are accepted by the receiving institution and are applied toward the student's current program of study. Dual credit hours are not counted when determining eligibility for an initial award as an entering undergraduate.

### 4. How long does an institution have to return TEOG Grant funds after determining a student is ineligible?

An institution must return funds to the THECB within 45 calendar days of a student becoming ineligible for the funding, except when the funds can be disbursed to a different eligible student (for whom funds have not yet been requested) within the 45-day period.

NOTE: If funds are disbursed after the end of a student's period of enrollment, the funds must be used to pay the student's outstanding balance at the institution or to make a payment on an outstanding student loan for that period. Under no circumstances are funds to be released to the student.

### 5. Can an institution continue to prorate awards now that the Texas Administrative Code provisions were removed?

Yes, institutions can continue prorating awards, but it is **no longer required**. Institutions now have the discretion to determine grant amounts (up to the semester maximum) if the student meets all eligibility criteria.

## APPENDIX 5: TEG FREQUENTLY ASKED QUESTIONS

### 1. Can TEG funds be awarded to a student in the same term/semester as an athletic scholarship?

No, a student who is obliged (contractually bound) to play an intercollegiate sport as a condition of the scholarship, regardless of the funding source or amount, is not eligible to receive a TEG award during the same term/semester for which the scholarship funds are being paid.

### 2. Are institutions required to verify that a student is a Texas resident to issue a TEG award?

Yes, institutions are required to verify that all TEG recipients are Texas residents based on the data collected using the required Core Residency Questions. The core questions are also collected and certified through the ApplyTexas application process, which is an additional resource an institution can use to determine a student's residency status.

### 3. How is the tuition differential calculated to determine TEG eligibility?

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.

To calculate the tuition differential, the institution must first identify its designated Southern Association of Colleges and Schools (SACS) level. SACS identifies institutions by the highest levels of degrees they offer. The THECB publishes average resident undergraduate and graduate tuition rates per semester credit hour for public institutions at various SACS levels each year in the TEG Program Guidelines. These amounts should be used by the institution to derive tuition differentials by using the following equation:

$$\text{Institution Hourly Tuition Rate} - \text{SACS Average Hourly Tuition} = \text{Difference} \times \# \text{ Total Hours Enrolled} = \text{Tuition Differential}$$

### 4. How long does an institution have after determining a student is ineligible to return TEG funds?

An institution must return funds to the THECB within 45 calendar days of a student becoming ineligible for the funding, except when the funds can be disbursed to a different eligible student (for whom funds have not yet been requested) within the 45-day period.

**NOTE:** If funds are disbursed after the end of a student's period of enrollment, the funds must be used to pay the student's outstanding balance at the institution or to make a payment on an outstanding student loan for that period. Under no circumstances are funds to be released to the student.

### 5. Can an institution continue to prorate awards now that the Texas Administrative Code provisions were removed?

Yes, institutions can continue prorating awards but are **no longer required**. Institutions now have the discretion to determine grant amounts if the student meets all eligibility criteria.

## APPENDIX 6: SACS PROGRAM LEVELS

INSTITUTION NAME	SACS LEVEL	UNDERGRADUATE TUITION RATE PER SCH	GRADUATE TUITION RATE PER SCH
Abilene Christian University	5	\$207	\$260
Austin College	3	\$200	\$282
Baylor University	6	\$257	\$343
Concordia University Texas	5	\$207	\$260
Dallas Baptist University	5	\$207	\$260
East Texas Baptist University	3	\$200	\$282
Hardin-Simmons University	5	\$207	\$260
Houston Baptist University	5	\$207	\$260
Howard Payne University	3	\$200	\$282
Huston-Tillotson University	3	\$200	\$282
Jacksonville College	1	\$67	n/a
Jarvis Christian College	2	\$58	n/a
LeTourneau University	3	\$200	\$282
Lubbock Christian University	3	\$200	\$282
McMurry University	3	\$200	\$282
Our Lady of the Lake University	5	\$207	\$260
Parker University	5	\$207	\$260
Paul Quinn College	2	\$58	n/a
Rice University	6	\$257	\$343
Schreiner University	3	\$200	\$282
Southern Methodist University	6	\$257	\$343
Southwestern Adventist University	3	\$200	\$282
Southwestern Assemblies of God University	5	\$207	\$260
Southwestern Christian College	2	\$58	n/a
Southwestern University	2	\$58	n/a
St. Edward's University	5	\$207	\$260
St. Mary's University	5	\$207	\$260
Texas Chiropractic College	5	\$207	\$260
Texas Christian University	6	\$257	\$343
Texas College	2	\$58	n/a
Texas Lutheran University	3	\$200	\$282
Texas Wesleyan University	6	\$257	\$343
The University of Dallas	5	\$207	\$260
Trinity University	3	\$200	\$282
University of Mary Hardin-Baylor	5	\$207	\$260
University of St. Thomas	5	\$207	\$260
University of the Incarnate Word	6	\$257	\$343
Wayland Baptist University	5	\$207	\$260
Wiley College	2	\$58	n/a

## APPENDIX 7: TCWS FREQUENTLY ASKED QUESTIONS

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### 1. Can a student classified as a non-citizen participate in the TCWS program?

Yes, an eligible non-citizen who is classified as a Texas resident by the institution and who is lawfully eligible for U.S. employment may participate in the TCWS program.

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### 2. Can a student work full time when employed through the TCWS program?

No, a student employed through the TCWS program can only work part-time in nonpartisan (non-governmental) and nonsectarian (non-religious) activities.

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### 3. Can unused TCWS funds be rolled over to the following fiscal year?

No, institutions are required to use their TCWS allocation for employment during the nine-month academic year (fall and spring terms). However, there can be an opportunity to transfer a portion of the unused funds to the Work-Student Student Mentorship Program or an eligible state grant program through the Authority to Transfer process.

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, 2022**. The Financial Aid Services staff will respond to the institution to provide next steps for the process.

## APPENDIX 8: CAL FREQUENTLY ASKED QUESTIONS

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### 1. Can institutions change disbursement amounts after a loan has been certified?

Yes, institutions can process changes to pending disbursements up to the original certified amount through the HelmNet loan portal during the loan period.

Institutions can make the following changes on pending disbursements during certain stages of the loan life cycle:

- cancel disbursement(s)
- change disbursement date
- change disbursement amounts
- change disbursement status

For instructions on how to process loan changes, refer to the [HelmNet Change Transactions Instruction Guide](#).

**Note:** To reinstate a loan, refer to [Requesting Loan Changes](#) section.

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### 2. Can a student who is not meeting satisfactory academic progress (SAP) appeal their SAP status and receive a CAL?

Yes, if an institution has an appeal process for students who have not met SAP requirements, it must be documented. Students whose SAP appeal has been approved by the institution can receive a CAL.

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### 3. Do institutions need to place academic holds on students who are delinquent on state loans?

No, as of Nov. 1, 2019, the THECB no longer places academic holds on delinquent borrowers. Therefore, institutions should not place an academic hold related to a THECB delinquency. The THECB believes this is an additional way to support students as they pursue their degrees.

Beginning January 2021, the THECB reinstated the MOVEit DMZ Cumulative Delinquency Report file (see [2021 State Financial Aid Resource Updates Memo](#)). Reporting can be used by institutions to help counsel students to reduce the likelihood of default and to avoid restrictions from borrowing future state loan funds-

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### 4. If a student has reached the maximum aggregate limits for Direct loans, are federal loan amounts considered when calculating the College Access Loan award amount?

No, while the CAL award amount calculation would deduct any financial assistance awarded to the student, it would not include the Direct subsidized or unsubsidized loans since this student would not be eligible once the aggregate limits have been reached.

## APPENDIX 9: TASSP FREQUENTLY ASKED QUESTIONS

### 1. What is the difference between an “alternate” and “replacement” for the TASSP?

- An “**alternate**” can be nominated when a new student does not complete their application by the deadline (set by the THECB) or fails to meet the requirements to receive the scholarship initially.
- A “**replacement**” can be nominated when a previous student fails to maintain eligibility for a continuation award. The replacement may use any eligibility that remains from the previous student.

### 2. Do Institutions need to place academic holds on students who are delinquent on state loans?

No, as of Nov. 1, 2019, the THECB no longer places academic holds on delinquent students. Therefore, institutions should not place students on an academic hold related to a THECB delinquency. The THECB believes this is an additional way to support students as they pursue their degrees.

Beginning January 2021, the THECB reinstated the MOVEit DMZ Cumulative Delinquency Report file (see [2021 State Financial Aid Resource Updates Memo](#)). Reporting can be used by institutions to help counsel students to reduce the likelihood of default and to avoid restrictions from borrowing future state loan funds.

### 3. Can institutions change disbursement amounts after a TASSP has been certified?

Yes, institutions can process changes to pending disbursements up to the original certified amount through the HelmNet portal during the scholarship period.

Institutions can make the following changes on pending disbursements during certain stages of the scholarship life cycle:

- cancel disbursement(s)
- change disbursement date
- change disbursement amounts
- change disbursement status

For instructions on how to process scholarship changes, refer to the [HelmNet Change Transactions Instruction Guide](#).

### 4. Can a TASSP be reinstated?

Yes, a TASSP can be reinstated up to the original certified amount for any of the following reasons:

- A student cancels the TASSP but later ends up needing the money during the scholarship period.
- The institution certifies a TASSP and returns funds to the THECB during the scholarship period.

Reinstatement requests **must** be submitted in writing through [CONTACT US](#) and include the following information:

- CommonLine Unique ID/Disbursement Number
- last four digits of the student’s SSN
- student’s full name (Last, First, MI)
- student’s Reference Number (if available)
- new disbursement dates and amounts (when applicable)

**Note:** For security purposes, do NOT provide the student’s full SSN when submitting online inquiries.

## APPENDIX 10: Quick Reference

### Websites, Portals and Guides

General program information for institutions	<a href="#">Student Financial Aid Programs Information Webpage</a>
General college enrollment and financial aid information for students	<a href="#">College for All Texans</a>
Request and return funds, modify student count, and search student award history	<a href="#">CBPass Grant Payment Portal</a> <a href="#">CBPass Quick Start Guide [PDF]</a>
Secure file transfer and processing portal	<a href="#">MOVEit DMZ Portal</a> <a href="#">MOVEit DMZ User Access Guide [PDF]</a>
Texas Education Agency Critical Shortage Areas and Education Aide definition	<a href="#">2021-22 Critical Shortage Areas</a> <a href="#">Educational Aide I,II,III</a>
General loan information for students	<a href="#">HHloans Website</a>
Loan and scholarship account information for institutions	<a href="#">HelmNet Login Portal</a> <a href="#">HelmNet Online Reporting Manual [PDF]</a> <a href="#">HelmNet Change Transactions Instruction Guide [PDF]</a>
THECB Ask ADVi - About Us	<a href="https://www.askadvi.org/about/">https://www.askadvi.org/about/</a>
THECB Ask ADVi - FAQs	<a href="https://www.askadvi.org/faq/">https://www.askadvi.org/faq/</a>

### Forms and Instructions

Form for adding, updating, or removing a user's access for state financial aid web portals	<a href="#">User Access Form [PDF]</a>
Form for returning grant and special program funds	<a href="#">Special Programs Online Return of Funds Form</a>
Instructions for returning funds electronically	<a href="#">Electronic Funds Transfer Information [PDF]</a>
Form for Private High School Certification	<a href="#">Private High School Certification Form [PDF]</a>
Educational Aide Fund Request Form	<a href="#">Funds Request Form (FRF) [PDF]</a>
Educational Aide 2021-22 Application	<a href="#">EAE 2021-22 Application [PDF]</a>
Form for returning loan program funds	<a href="#">Loan Programs Online Return of Funds Form</a>

### Work-Study Student Mentorship Program (WSMP) Reporting

Spreadsheet for compiling data to complete WSMP Financial Report	<a href="#">Financial Report Template [XLSX]</a>
Spreadsheet for compiling data to complete WSMP Annual Outcome Report	<a href="#">Annual Outcome Report Template [XLSX]</a>
Sample WSMP Memorandum of Understanding (MOU) between institution and independent school district	<a href="#">Sample MOU [PDF]</a>