

2023 - 2024

# State Financial Aid Program Guidelines



**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 relevant statutes and rules. The information in this document is to be used solely as a resource and does not override the statute or rules for this program.

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** ([TAC, Title 19, Section 22.225](#))

The Toward EXcellence, Access, & Success (TEXAS) Grant Program is authorized by [TEC, Title 3, Chapter 56, Section 56.302](#). Rules for administering the program can be found in [TAC, Title 19, Chapter 22, Subchapter L](#). The program is funded by appropriations from the Texas Legislature and from any gifts and grants to the program. The purpose of the TEXAS Grant Program is to provide financial aid to eligible students attending Texas public institutions of higher education.

## **State Priority Deadline** ([TEC, Title 3, Section 56.008](#) and [TAC, Title 19, Section 22.6](#))

The THECB sets the same priority deadline for all applications that qualify for state-funded financial aid 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, Title 3, 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** ([TAC, Title 19, Section 22.227](#))

GATIs (**excluding** Lamar State College Orange and Lamar State College Port Arthur) and medical and dental units (i.e., health-related institutions, or HRIs), as defined in [TEC, Title 3, Section 61.003](#), are eligible to participate in this program.

## Program Eligibility

**Initial Eligibility** ([TAC, Title 19, 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 [Selective Service Statement](#));
- ✓ have applied for any available financial aid;
- ✓ have financial need;
- ✓ be enrolled at least 3/4 time;
- ✓ not have earned a baccalaureate degree;
- ✓ not have been convicted of:
  - any felony; or
  - any offense under the law of any jurisdiction involving a controlled substance as defined by the [Health and Safety Code, Chapter 481, Texas Controlled Substances Act](#); and
- ✓ be enrolled in a baccalaureate degree program at a public four-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 *before 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 *before 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 *no later than 12 months* after being released from active duty military service with an Honorable Discharge, General Discharge under Honorable Conditions, or Honorable Separation or Release from Active Duty, as documented by a Certificate of Release or Discharge from Active Duty (DD214) issued by the Department of Defense. Enlistment in the military must have occurred *within 12 months after graduation* from an accredited public or private high school in Texas. 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.

## Additional Information

### High School Recipient

Home-schooled students are not eligible for an initial year 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 ([TEC, Title 3, Section 56.3041](#)).

### 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 Pathway** 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.

### Child Support Arrearages

Per Texas Family Code, Title 5, Section 231.006, a student who is obligated to pay child support and is more than 30 days delinquent is not eligible to receive a state-funded grant or loan.

Institutions determine how to best comply with this state requirement and should work with their legal counsel on questions related to this statutory mandate.

## Renewal Eligibility Requirements ([TAC, Title 19, Section 22.228](#) and [22.230](#))

**To receive a renewal year (RY) award, a student must:**

- ✓ have previously received an initial year TEXAS grant;
- ✓ be classified by the institution as a Texas resident;
- ✓ be registered with Selective Service or be exempt (see [Selective Service Statement](#));
- ✓ have financial need;
- ✓ be enrolled at least 3/4 time;
- ✓ maintain satisfactory academic progress (SAP); and
- ✓ not have been convicted of:
  - any felony; or
  - any offense under the law of any jurisdiction involving a controlled substance as defined by the [Health and Safety Code, Chapter 481, Texas Controlled Substances Act](#).

## Conviction Restrictions ([TAC, Title 19, Section 22.230](#))

A student is not eligible to receive a TEXAS Grant award if they are convicted of a felony or **any** offense under the law in any jurisdiction involving a controlled substance as defined by the [Health and Safety Code, Chapter 481, 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 they 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.

**⚠ ALERT:** The eligibility requirement found under TEC, Sections [56.304](#) and [56.305](#), relates to **convictions of any felony as well as convictions of any offense under Chapter 481**. The phrase is not limited to controlled substance felonies. For more information, please refer to the [Updated Requirements that Impact Financial Aid Memo](#) from **Sept. 29, 2021**.

Institutions are required to collect a statement (electronic or paper) from each TEXAS Grant recipient to confirm eligibility before they disburse funds. This statement must be kept with the student’s records at the institution and be made available if requested during a program review or audit. Each statement must be kept for seven years after the end of the student’s award period ([TAC, Title 19, 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.

**Note:** Institutions should consult with their legal counsel concerning questions about this program requirement.

**Statement of Student Eligibility**

Have you ever been convicted of a felony?  
 Yes     No

Have you ever been convicted of an offense under Chapter 481, Health and Safety Code (Texas Controlled Substances Act, or under any the law of another jurisdiction involving a controlled substance as defined by Chapter 481, Health and Safety Code?  
 Yes     No

I hereby certify that the information provided in this statement is true and correct to the best of my knowledge. 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 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 Full Name: \_\_\_\_\_ Date: \_\_\_\_\_

Student Signature: \_\_\_\_\_

## Discontinuation of Eligibility [\(TAC, Title 19, Section 22.230\)](#)

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 program of less than 4 years	If enrolled in 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>	3 years from the first semester awarded	4 years from the first semester awarded	150 SCHs	90 SCHs <b>No hardship allowed</b>
<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>	5 years from the first semester awarded	6 years from the first semester awarded	150 SCHs	150 SCHs <b>No hardship allowed</b>

\*\***Attempted hours** are defined as every course in every semester for which a student has been registered as of the official census date for that semester. 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 [\(TAC, Title 19, Section 22.231\)](#)

A student who is ineligible for a TEXAS Grant may be eligible under a hardship provision based on one of the following provisions:

- If the student is enrolled in less than 9 SCHs (but at least 6 SCHs)
- If the student's GPA falls below SAP requirements
- If the student's completion rate falls below SAP requirements
- If the student's number of completed hours falls below SAP requirements
- If the student requires an extension of the year limits to complete their degree
- If the student receives a grant after **attempting** more than 150 hours
  - However, the total number of hours **paid for**, at least in part, with TEXAS Grant funds may not exceed 150 semester credit hours or the equivalent.

The institution will determine any acceptable reasons to grant a hardship decision. 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.

 **ALERT:** A student enrolled for fewer than 6 SCHs CANNOT receive a TEXAS Grant award, regardless of the circumstances, including hardships (See [TAC, Title 19, Section 22.230\(b\)](#)).

## Satisfactory Academic Progress ([TAC, Title 19, Section 22.229](#))

At the end of the first academic year, a student must meet SAP requirements, which include the GPA and completion rate (pace) calculations, 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 SCHs in the most recent academic year	2.5 cumulative GPA on a 4-point scale or its equivalent

### Summer Satisfactory Academic Progress Requirements

If the student *receives* state grant funding for the summer term(s), institutions must include credits attempted for summer coursework when calculating the SAP.

If a student *does not receive* state grant funding for the summer term(s), a student can take summer coursework to reestablish 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 ([TAC, Title 19, 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 students over Initial Year students.
- Once all eligible RY students have been awarded, precedence goes to eligible IY applicants who do not exceed the priority Expected Family Contribution (EFC).
  - Of eligible applicants not exceeding the priority EFC, greatest precedence goes to those meeting the **priority model** criteria ([TEC, Title 3, Section 56.303\(f\)](#)), beginning with the lowest EFC ([TEC, Title 3, Section 56.303\(e\)](#)).
  - Of the remaining eligible applicants who 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

#### **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 2023-24 is \$6,464.

### 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 ([TAC, Title 19, Section 22.234](#))

Students receiving a TEXAS Grant cannot exceed the **semester** maximum amount. Students may be issued a total of three awards (fall, spring, and summer) in an academic year. Proration is not required for this program, but institutions have discretion on determining the grant amount, up to the semester maximum.

- The award maximum amount is \$5,387 per semester.
- A student could receive up to \$16,161 for the 2023-24 award year.
- Target awards are still encouraged (\$2,500 per semester = up to \$7,500).

2023-24 Award Maximums				
Students may be issued a total of three 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	\$5,387	\$16,161	\$2,500	\$7,500

## Priority Model Criteria ([TAC, Title 19, 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 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 high school 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 the Texas Education Agency's Curriculum Standards and Student Support Division at <a href="mailto:curriculum@tea.texas.gov">curriculum@tea.texas.gov</a>. A historical comparison chart is available that reviews the <a href="#">recommended program requirements</a>.</p>	

## Covering Tuition and Fees ([TAC, Title 19, 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.

A “required fee,” for the purpose of administering the TEXAS Grant Program, includes mandatory fees (required by statute), discretionary fees (authorized by statute, imposed by the governing board of an institution), or fees that an institution charges to a student as a condition of enrollment at the institution or in a specific course.

## Over Awards ([TAC, Title 19, 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 award disbursement is greater than \$300.

## Award Adjustments ([TAC, Title 19, 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](#) requirements.

## Processing Funds

Each biennium (the two-year state budget period), funds not requested in the first year will be carried forward by the THECB on behalf of the institution 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.

Institutions can **begin submitting** requests for funding on **August 15, 2023**. The THECB will **begin processing** funds after **September 1, 2023**. Institutions have through **August 1, 2024**, to request program funds. An official notification will be sent to institutions in the summer to provide instructions on how to request funds for FY 2024.

### Timely Distribution of Funds ([TAC, Title 19, 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 ([TAC, Title 19, 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 must document the reason for a student's late disbursement. All late disbursements must be processed before 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 ([TAC, Title 19, Section 22.11](#))

Institutions participating in a combination of either Texas College Work-Study (TCWS), or Work-Study Student Mentorship Program (WSMP) and TEXAS Grant 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. This threshold applies to the program from which the funds are transferred.

Transfer requests are submitted by the institution to the THECB using an online Authority to Transfer form. An official notification will be sent to institutions during the award year. Institutions requesting a transfer of funds must submit a request by **July 1, 2024**.

# 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 relevant statutes and rules. The information in this document is to be used solely as a resource and does not override the statute or rules for this program.

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 ([TAC, Title 19, Section 22.253](#))

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

## State Priority Deadline ([TEC, Title 3, Section 56.008](#) and [TAC, Title 19, Section 22.6](#))

The THECB sets the same priority deadline for all applications that qualify for state-funded financial aid 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, Title 3, 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 ([TAC, Title 19, Section 22.255](#))

Community colleges, public state colleges, and public technical institutes, as defined in [TEC, Title 3, Section 61.003](#), are eligible to participate in this program.

## Program Eligibility

### Eligibility Requirements ([TAC, Title 19, Section 22.256](#) and [22.258](#))

To receive an initial year (IY) award, a student must:	To receive a renewal year (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 <a href="#">Selective Service Statement</a>);</li> <li>✓ have applied for any available financial aid;</li> <li>✓ have financial need;</li> <li>✓ be enrolled at least half time as an undergraduate student in an associate degree or certificate program at a two-year institution;</li> <li>✓ not have attempted more than 30 semester credit hours (SCHs), excluding credits for dual enrollment or by examination;</li> <li>✓ not have earned an associate or baccalaureate degree;</li> <li>✓ not be concurrently receiving a TEXAS Grant;</li> <li>✓ not have been convicted of:                             <ul style="list-style-type: none"> <li>• any felony; or</li> <li>• any offense under the law of any jurisdiction involving a controlled substance as defined by the <a href="#">Health and Safety Code, Chapter 481, Texas Controlled Substances Act</a>.</li> </ul> </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 half time as an undergraduate student in an associate degree or certificate program at a two-year institution;</li> <li>✓ maintain satisfactory academic progress;</li> <li>✓ not have earned an associate or baccalaureate degree;</li> <li>✓ not be concurrently receiving a TEXAS Grant;</li> <li>✓ not have been convicted of:                             <ul style="list-style-type: none"> <li>• any felony; or</li> <li>• any offense under the law of any jurisdiction involving a controlled substance as defined by the <a href="#">Health and Safety Code, Chapter 481, Texas Controlled Substances Act</a>.</li> </ul> </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.

### High School Equivalency Degree

A student who received a GED or high school equivalency certificate 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.

### Child Support Arrearages

Per Texas Family Code, Title 5, Section 231.006, a student who is obligated to pay child support and is more than 30 days delinquent is not eligible to receive a state-funded grant or loan.

Institutions determine how to best comply with this state requirement and should work with their legal counsel on questions related to this statutory mandate.

## Conviction Restrictions ([TAC, Title 19, Section 22.258](#))

A student is not eligible to receive a TEOG award if they are convicted of any felony or of an offense under the law in any jurisdiction involving a controlled substance as defined the [Health and Safety Code, Chapter 481, 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 they 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.

**⚠️ ALERT:** The eligibility requirement found under TEC, Sections [56.404](#) and [56.405](#), relates to **convictions of any felony as well as convictions of any offense under Chapter 481**. The phrase is not limited to controlled substance felonies. For more information, please refer to the [Updated Requirements that Impact Financial Aid Memo](#) from **Sept. 29, 2021**.

Institutions are required to collect a statement (electronic or paper) from each TEOG recipient to confirm eligibility before they disburse funds. This statement must be kept with the student’s records at the institution and be made available if requested during a program review or audit. Each statement must be kept for seven years after the end of the student’s award period (see [TAC, Title 19, 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.

**Note:** Institutions should consult with their legal counsel concerning questions about this program requirement.

## Discontinuation of Eligibility ([TAC, Title 19, Section 22.258](#))

TEOG funds can be used to pay for a maximum of 75 SCHs while a student remains eligible. 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 SCHs	75 SCHs 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 for that semester, regardless of whether TEOG funds were used to pay for those courses. 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 ([TAC, Title 19, Section 22.259](#))

A student who is ineligible for a TEOG may be eligible under a hardship provision based on one of the following provisions:

- The student’s GPA falls below SAP requirements.
- The student's completion rate falls below SAP requirements.
- The student is enrolled for less than 6 SCHs.
- The student receives a grant after **attempting** more than 75 hours.
  - However, the total number of hours **paid for**, at least in part, with TEOG funds may not exceed 75 semester credit hours or the equivalent.
- The student requires an extension of the year limits.

The institution will determine any acceptable reasons to grant a hardship decision. 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 ([TAC, Title 19, Section 22.257](#))

At the end of the first academic year, a student must meet the satisfactory academic progress (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% 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 1 <sup>st</sup> Academic Year	Institution SAP policy	
End of 2 <sup>nd</sup> Academic Year and All Subsequent Years	Complete 75% of attempted SCHs in the most recent academic year	2.5 cumulative GPA on a 4-point scale or its equivalent

### Summer Satisfactory Academic Progress Requirements

If the student *receives* state grant funding for the summer term(s), institutions must include credits attempted for summer coursework when calculating the SAP.

If a student *does not receive* state grant funding for the summer term(s), the student can take summer coursework to reestablish 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 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.

### Maximum Hours of Eligibility

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

### 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 ([TAC, Title 19, 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 students over Initial Year students.
- Once all eligible RY students have been awarded, precedence goes to eligible IY applicants who do not exceed the priority Expected Family Contribution (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\(14\)](#)).

**⚠️ 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 2023-24 is \$6,464.

### 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 ([TAC, Title 19, Section 22.261](#))

Students receiving a TEOG award cannot exceed the **semester** maximum amount. Students may be issued a total of three awards (fall, spring, and summer) in an academic year. Proration is not required for this program, but institutions have discretion in determining the grant amount, up to the semester maximum.

2023-24 Award Maximums		
Students may be issued a total of three awards (fall, spring, and summer) in an academic year.		
Institution Type	Year Max	Semester Max (fall, spring & summer)
Public State Colleges	\$5,055	\$1,685
Public Technical Institutes	\$11,820	\$3,940
Public Community Colleges	\$5,358	\$1,786

## Covering Tuition and Fees ([TAC, Title 19, Section 22.261](#))

### Updated **ALERT: Statutory TEOG Changes**

House Bill (HB) 8, Section 16, was passed during the 88th legislative session which amended TEC, Section 56.407(g). The bill **removed** existing text that restricts an institution from using Pell grant funds, to cover any difference in the amount of TEOG and the actual amount of tuition and required fees being charged at the institution. While the amendment is effective as of Sept. 1, 2023, the change in law applies beginning with TEOG awards for the **fall 2024 semester**.

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, state, institutional, or outside sources.

A “required fee,” for the purpose of administering the TEOG Program, includes mandatory fees (required by statute), discretionary fees (authorized by statute, imposed by the governing board of an institution), or 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 of whether the student is charged in-district or out-of-district tuition and fees.

## Over Awards ([TAC, Title 19, 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 award disbursement is greater than \$300.

## Award Adjustments ([TAC, Title 19, 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](#) requirements.

## Processing Funds

Each biennium (the two-year state budget period), funds not requested in the first year will be carried forward by the THECB on behalf of the institution 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.

Institutions can **begin submitting** requests for funding on **August 15, 2023**. The THECB will **begin processing** funds after **September 1, 2023**. Institutions have through **August 1, 2024**, to request program funds. An official notification will be sent to institutions in the summer to provide instructions on how to request funds for FY 2024.

### Timely Distribution of Funds ([TAC, Title 19, 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 ([TAC, Title 19, 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 must document the reason for a student's late disbursement. All late disbursements must be processed before 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 ([TAC, Title 19, Section 22.11](#))

Institutions participating in a combination of either Texas College Work-Study (TCWS) or Work-Study Student Mentorship Program (WSMP) and TEOG 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. This threshold applies to the program from which the funds are transferred.

Transfer requests are submitted by the institution to the THECB using an online Authority to Transfer form. An official notification will be sent to institutions during the award year. Institutions requesting a transfer of funds must submit a request by **July 1, 2024**.

# Tuition Equalization 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 relevant statutes and rules. The information in this document is to be used solely as a resource and does not override the statute or rules for this program.

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 3](#).

## **Program Authority and Purpose** ([TAC, Title 19, Section 22.21](#))

The Tuition Equalization Grant (TEG) Program was authorized by [TEC, Chapter 61, Section 61.221](#). Rules for administering the subchapter can be found in TAC, Title [19, Chapter 22, Subchapter B](#). The program is funded by appropriations from 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, Title 3, Section 56.008 and TAC, Title 19, Section 22.6](#))

The THECB sets the same priority deadline for applications that qualify for state-funded financial aid in an academic year. General Academic Teaching Institutions (including Lamar State College Orange and Lamar State College Port Arthur) in Texas, as defined in [TEC, Title 3, 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** ([TAC, Title 19, Section 22.23](#))

Any private or independent institution of higher education defined in [TEC, Title 3, Section 61.003\(15\)](#), or a branch campus located in Texas that meets specific accreditation requirements, other than theological or religious seminaries, is eligible to participate in this program.

## Program Eligibility

### Eligibility Requirements ([TAC, Title 19, Section 22.24](#))

To receive an award, a student must:	
✓	be classified by the institution as a Texas resident;
✓	be registered with Selective Service or be exempt (see <a href="#">Selective Service Statement</a> );
✓	have financial need;
✓	be enrolled at least 3/4 time;
✓	be an undergraduate <b>or</b> graduate student enrolled in a degree plan leading to a <b>first</b> associate, baccalaureate, master's, professional, or doctoral degree (excluding degree plans that are intended to lead to religious ministry);
✓	maintain satisfactory academic progress (SAP) - see <a href="#">SAP section</a> ;
✓	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) a TEG is awarded; and
✓	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.

**⚠ ALERT: Enrollment in Degree Programs Leading to Religious Ministry ([TAC, Title 19, Section 22.22\(8\)](#))**

Enrollment in a degree program leading to religious ministry makes a student ineligible for a TEG award. If a TEG recipient adds a degree leading to religious ministry, 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.

### Discontinuation of Eligibility ([TAC, Title 19, 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 certificated program of 4 years or less	If enrolled in a degree or certificated program for more than 4 years
Recipient working toward an associate or baccalaureate degree	<b>5 years</b> from the first semester awarded	<b>6 years</b> from the first semester awarded
Recipient working towards a master's, professional or doctoral degree	<b>No maximum time limit</b>	

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

## Hardship Provisions ([TAC, Title 19, Section 22.27](#))

A student who is ineligible for a TEG may be eligible under a hardship provision based on one of the following provisions:

- If the student is enrolled in less than ¾ time of full-time enrollment
- If the student's GPA falls below SAP requirements
- If the student's completion rate falls below SAP requirements
- If the student's number of completed hours falls below SAP requirements
- If the student requires an extension of the year limits to complete their certificate or degree

The institution will determine any acceptable reasons to grant a hardship decision. 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 ([TAC, Title 19, 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 (SCHs) 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 SCHs 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 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 or later – <b>Undergraduate Students</b>	Complete 24 SCHs 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>	Complete 18 SCHs in the most recent academic year		

### Summer Satisfactory Academic Progress Requirements

If the student *receives* state grant funding for the summer term(s), institutions must include credits attempted for summer coursework when calculating the SAP.

If a student *does not receive* state grant funding for the summer term(s), a student can take summer coursework to reestablish 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

### Child Support Arrearages

Per Texas Family Code, Title 5, Section 231.006, a student who is obligated to pay child support and is more than 30 days delinquent is not eligible to receive a state-funded grant or loan.

Institutions determine how to best comply with this state requirement and should work with their legal counsel on questions related to this statutory mandate.

### 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.

### 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. However, failing grades are considered attempted hours and, therefore, must be counted in the calculation of a student's completion rate.

### 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

To receive funds for the biennium, private and independent institutions are invited to participate in the TEG allocation process and must opt in by June 1 of each odd-numbered year. Those that opt out will not be considered in the allocation calculation.

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.

 **Updated ALERT: Update to Exceptional Need** ([TAC, Section 22.24\(b\)](#))

The following rule change was proposed after consensus during negotiated rulemaking activities in November 2022 and approval by the Board in April 2023.

[TAC, Section 22.24\(b\)](#): The term "exceptional need" was changed to provide institutions with greater flexibility in supporting economically disadvantaged students through funds from the TEG program. The **previous** rule for "exceptional need" was for an undergraduate student that had an expected family contribution (EFC) less than or equal to \$1,000.

**Beginning 2023-24**, exceptional need will apply to undergraduate students that have an EFC less than or equal to 50% of the federal Pell Grant eligibility cap that aligns with the year the institution is packaging (i.e., institutions will use 50% of the 2023-24 Pell grant cap to determine which students can receive a TEG award in 2023-24).

### 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 ([TAC, Title 19, Section 22.28](#))

Students receiving a TEG cannot exceed the annual maximum amount. Proration is not required for this program, but institutions have discretion in determining the grant amount, up to the annual maximum.

- A student may receive up to the annual maximum amount of \$3,873 (undergraduates with exceptional need may receive up to \$5,810).
- Total awards for fall, spring, and summer terms cannot exceed the annual maximum.
- TEG does **NOT** have a semester maximum.

2023-24 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	\$3,873	\$5,810

## Tuition Differential ([TAC, Title 19, 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 2023-2024 academic year. These amounts should be used by the institution to derive tuition differentials by using the student’s total SCHs and multiplying by the tuition rate indicated (see [Appendix 1](#) for individual institutional program levels).

SACS Level	Undergraduate Tuition Rate Per SCH	Graduate Tuition Rate Per SCH
Associate Degree - <b>Level 1</b>	\$68	n/a
Baccalaureate Degree - <b>Level 2</b>	\$65	n/a
Master’s Degree - <b>Level 3</b>	\$220	\$315
Three or Fewer Doctoral Degrees - <b>Level 5</b>	\$201	\$258
Four or More Doctoral Degrees - <b>Level 6</b>	\$268	\$360
<b>Public Institution Rates for Law School Students = \$971 Per SCH</b>		

## Over Awards ([TAC, Title 19, 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 award disbursement is greater than \$300.

## Award Adjustments ([TAC, Title 19, 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 requirements](#).

## Additional Information

### Tuition Differential Example

- Charges for an independent two-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 3 = \$220
- Undergraduate student is enrolled in 12 SCHs for fall and 15 SCHs for spring

#### To calculate tuition differential:

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

**For Example:**  
 \$515 - \$220 = \$295  
 \$295 x 27 SCHs = \$7,965

This student is eligible for a TEG award since the tuition differential (\$7,965) is more than the maximum award (\$3,873).

## Processing Funds

Each biennium (the two-year state budget period), funds not requested in the first year will be carried forward by the THECB on behalf of the institution 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.

Institutions can **begin submitting** requests for funding on **August 15, 2023**. The THECB will **begin processing** funds after **September 1, 2023**. Institutions have through **August 1, 2024**, to request program funds. An official notification will be sent to institutions in the summer to provide instructions on how to request funds for FY 2024.

### Timely Distribution of Funds ([TAC, Title 19, 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 ([TAC, Title 19, 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 must document the reason for a student's late disbursement. All late disbursements must be processed before 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 ([TAC, Title 19, Section 22.11](#))

Institutions participating in a combination of either Texas College Work-Study (TCWS), or Work-Study Student Mentorship Program (WSMP) 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. This threshold applies to the program from which the funds are transferred.

Transfer requests are submitted by the institution to the THECB using an online Authority to Transfer form. An official notification will be sent to institutions during the award year. Institutions requesting a transfer of funds must submit a request by **July 1, 2024**.

# Texas College Work-Study Program



**ALERT:** The former Texas College Work-Study Program and the Work-Study Student Mentorship Program guidelines were combined to align with the Texas Education Code and Texas Administrative Code.

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 relevant statutes and rules. The information in this document is to be used solely as a resource and does not override the statute or rules for this program.

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 1](#).

## State Program Authority and Purpose ([TAC, Title 19, Section 22.127](#))

The Texas College Work-Study Program is authorized by [TEC, Title 3, Chapter 56, Subchapter E, Section 56.073](#), which includes the Work-Study Student Mentorship Program, authorized by [TEC, Section 56.079](#). Rules for administering these programs can be found in [TAC, Title 19, Chapter 22, Subchapter G](#). In these guidelines, the overarching program for Texas College Work-Study will simply be referred to as the “Program” or “TCWS” and the Work-Study Student Mentorship Program will be referred to as “Mentorship Program”.

The purpose of the Program is to provide eligible students with jobs, funded in part by the state of Texas, to enable those students to attend eligible institutions of higher education in Texas and, through a Mentorship Program, to mentor, tutor, or advise college students at participating eligible institutions of higher education or high school students within local school districts and nonprofit organizations.

## State Priority Deadline ([TEC, Title 3, Section 56.008](#) and [TAC, Title 19, Section 22.6](#))

The THECB sets the same priority deadline for all applications that qualify for state-funded financial aid 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, Title 3, 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 ([TAC, Title 19, Section 22.129](#))

Any public, private, or independent institution of higher education as defined in [TEC, Title 3, Section 61.003](#), except theological or religious seminary institutions, is eligible to participate in the program.

**NOTE:** Private or independent institutions of higher education offering only professional or graduate degrees are **NOT** eligible to participate in the Mentorship Program.

## Program Eligibility

### Eligibility Requirements ([TAC, Title 19, Section 22.130](#))

**To be eligible for employment in the Program, a student must:**

- be classified by the institution as a Texas resident;
- be registered with Selective Service or be exempt (see [Selective Service Statement](#));
- have financial need;
- be enrolled at least half-time and be seeking 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 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; and
- receive appropriate training and supervision, if participating in the Mentorship program.

### Mentorship Training Requirements ([TAC, Title 19, Section 22.130](#))

Participating institutions must ensure that 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

## Additional Information

### Non-Texas Student Residents

Non-Texas resident students are not eligible to receive work-study, 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 Work-Study Program. This includes Deferred Action for Childhood Arrivals recipients.

### Child Support Arrearages

Per [Texas Family Code, Title 5, Section 231.006](#), a student who is obligated to pay child support and is more than 30 days delinquent is not eligible to receive a state-funded grant or loan.

Institutions determine how to best comply with this state requirement and should work with their legal counsel on questions related to this statutory mandate.

## Program Participation Requirements ([TAC, Title 19, Section 22.129](#) and [22.131](#))

Participating institutions may enter into agreements with off-campus employers or provide on-campus employment. To be eligible to participate, employers 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 positions only to supplement and not to supplant positions normally filled by persons not eligible to participate in the program; and
- provide certain wage and employee benefits (see [Required Matching](#) section).

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### For the Mentorship Program

An eligible institutions must establish a mentorship program designed to improve and increase student access, success, and completion of higher education and provide employed Mentorship Program students with opportunities 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 mentorship program must provide:

- 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; and
- matching funds, including partner match (see [Required Matching](#) section).

### Mentorship Program 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), the Texas Application for State Financial Aid (TASFA), the 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.

## Awarding

### Allocations ([TAC, Title 19, Section 22.133](#))

All eligible institutions will be invited to participate in the Texas College Work-Study Program and the Work-Study Mentorship Program before the start of the biennium; those choosing not to participate in one or both programs will be excluded from calculations for the relevant year.

 **ALERT: Texas Administrative Code Changes** [TAC, Title 19, Section 22.133](#) and [TAC, Title 19, Section 22.135](#)

After consensus during negotiated rulemaking activities in May 2022 and approval by the board of the THECB in October 2022, rules were amended to alter the allocation methodology and disbursement process used for the Texas College Work-Study Program and the Work-Study Student Mentorship Program.

**Beginning with FY 2024:**

- Individual allocations will be combined into one single allocation and will be calculated for both years of the biennium.
- Institutions choosing to participate in both the Texas College Work-Study and the Work-Study Mentorship Program must disburse a minimum of 25% of their allocation to students participating in the Mentorship Program. Institutions indicating participation in only one work-study program may only use allocated funding for the program in which they indicated intention to participate.
- Aspects of the allocation rule regarding reallocations and summer awards were removed, as they are no longer relevant. However, institutions may use funds for summer. All funds must be requested by August 1 and expended by August 31 of the current fiscal year.
- Institutions can request funds throughout the academic year, the THECB will no longer disburse a lumpsum of the institution's allocation.

### Awarding Requirements

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 an 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) ([TAC, Title 19, Section 22.1](#)).

**Example 1:**

**\$10,000 (COA) – \$3,000 (EFC) = \$7,000 (financial need)**

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

**Example 2:**

**\$10,000 (COA) – \$15,000 (EFC) = -\$5,000 (no financial need)**

In this example, the student has no financial need and is not eligible for an award for the academic year.

## Required Matching ([TAC, Title 19, Section 22.129](#)) and ([TAC, Title 19, Section 22.131](#))

Participating institutions must:

- **For TCWS:** 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.
- **For Mentorship Program:** provide at least **10%** of an employed mentor's wages and **100%** of other employee benefits for the employed student from sources other than federal college work-study program funds.

**NOTE:** 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 Mentorship Program institution. The school district and nonprofit partners must provide documentation of their matching funds to the institution.

Participating **Off-Campus Employers:**

**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.

**For-profit** employers must:

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

## Work-Study Title III Exemption

Institutions that are **eligible for Title III funds** from the U.S. Department of Education are **exempt from the** requirement to provide a percentage of an employed student's wages. To qualify for this exemption, an institution must submit a current copy of its Title III eligibility letter to the THECB, upon request. The THECB will notify institutions on how to submit the letter.

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

## Processing Funds

Each biennium (the two-year state budget period), funds not requested in the first year will be carried forward by the THECB on behalf of the institution 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.

Institutions can begin submitting requests for funding on **August 15, 2023**. The THECB will begin processing funds after **September 1, 2023**. Institutions have through **August 1, 2024**, to request program funds. An official notification will be sent to institutions in the summer to provide instructions on how to request funds for FY 2024.

## Authority to Transfer ([TAC, Title 19, Section 22.11](#))

Institutions participating in a combination of either Texas College Work-Study (TCWS) or Work-Study Student Mentorship Program (WSMP) and one of the three state grant programs (TEXAS Grant, TEOG, 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. This threshold applies to the program from which the funds are transferred.

Institutions participating in both the TCWS and 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 by the institution to the THECB using an online Authority to Transfer form. An official notification will be sent to institutions during the award year. Institutions requesting a transfer of funds must submit a request by **July 1, 2024**.

## Reporting

### Mentorship Program Reporting Requirements

Participating institutions must report to the THECB the progress made by students being assisted through the Mentorship Program. 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.

### Online Reporting Process

Mentorship Program institutions submit program progress reports and applicable supplemental documents (e.g. Off-Campus MOU) through the Mentorship Institution Online Report Portal. Reporting templates provided in [Appendix 1](#) can be used as a resource.

Each institution designates a Mentorship Institution 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 [WSPM Institution Online Report Portal Guide](#).

To meet the reporting requirements, institutions must submit an **Annual Program Summary Report** that collects aggregate information. **Reporting** 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
- Program overview
- Type of activities implemented
- Off-Campus MOU, if applicable

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

Report	Reporting Period	Due Date
Annual Program Summary Report	Sept. 1 – Aug. 31, 2024	Sept. 5, 2024

# College Access Loan

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 relevant statutes and rules. The information in this document is to be used solely as a resource and does not override the statute or rules for this program.

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** ([TAC, Title 19, 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 for administering the program can be found in [TAC, Title 19, Chapter 22, Subchapter C](#). The CAL Program provides alternative educational loans to Texas students who are unable to meet the cost of attendance.

## **Eligible Institutions** ([TAC, Title 19, 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, Title 3, Section 61.003](#)
- Regional education service centers or other entities that offer an alternative educator certification program approved by the State Board for Educator Certification, as defined in [TEC, Title 2, Section 21.049](#)

## Program Eligibility

### Eligibility Requirements ([TAC, Title 19, Section 22.46](#) & [22.47](#))

Students must:	Cosigners 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 <a href="#">Selective Service Statement</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; or an approved alternative educator certification program;</li> <li>✓ meet the satisfactory academic progress (SAP) requirements set by the institution; and</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; and</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>
	<p style="text-align: center;"><b>Student and cosigner must meet the following credit approval requirements:</b></p> <ul style="list-style-type: none"> <li>✓ Have an Experian VantageScore of 650 or higher</li> <li>✓ Does not have public records such as tax liens or bankruptcy proceedings</li> <li>✓ Have a minimum of four credit trade lines, excluding student loans or authorized user accounts</li> <li>✓ Does not have defaulted on any federal or private education loans</li> </ul>

### Satisfactory Academic Progress ([TAC, Title 19, Section 22.46](#))

A student must meet the minimum 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 an SAP appeal has been approved by the institution.

### Additional Information

#### 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.

#### Child Support Arrearages

Per [Texas Family Code, Title 5, Section 231.006](#), a student who is obligated to pay child support and is more than 30 days delinquent is not eligible to receive a state-funded grant or loan.

Institutions determine how to best comply with this state requirement and should work with their legal counsel on questions related to this statutory mandate.

## Awarding

### Award Amounts ([TAC, Title 19, 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 [TAC, Title 19, Section 22.46\(b\)](#))

### 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).

#### **ALERT: Change to Aggregate Loan Amount**

Beginning with applications received by **Sept. 1, 2023**, the THECB will calculate the final loan amount based on a student's "manageable debt" for the borrower's program of study (see [amounts](#)). Depending on the calculation, the loan could be reduced or canceled by the THECB after the loan has been certified by an institution (see [TAC, Section 22.49\(c\)](#)).

**Prior to Sept. 1, 2023**, the Financial Aid Administrator certifies the loan application using one of the following two methods:

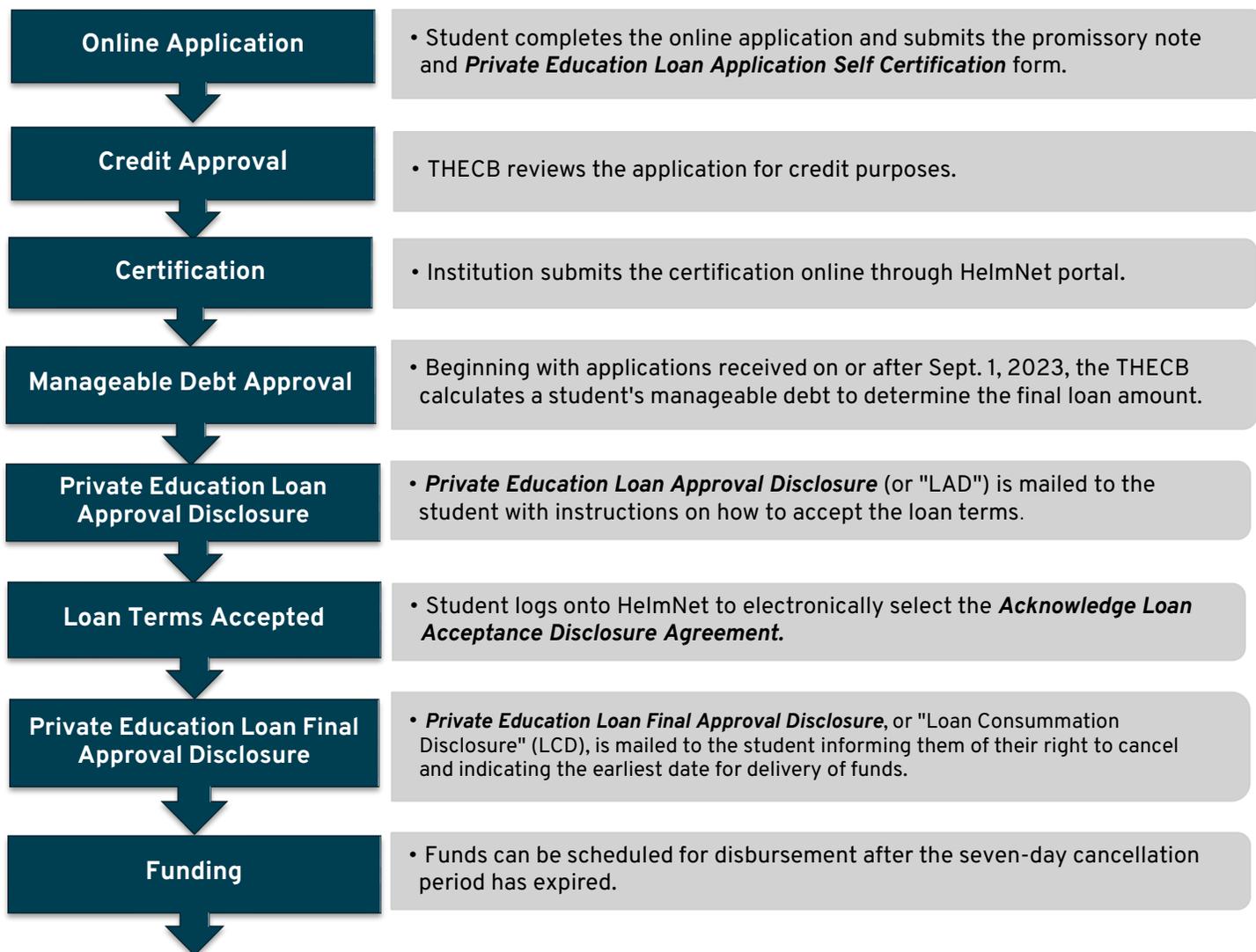
1. Certify the loan through the [HelmNet portal](#).  
**Note:** Institutions must submit a [User Access Form](#) to request, update, or remove access to the HelmNet portal.
2. Submit a **Commonline Loan Certification File** using the [MOVEit DMZ](#) secure file transfer portal.

**Beginning Sept. 1, 2023**, the Financial Aid Administrator will only be able to certify loan applications through [HelmNet portal](#); commonline certification will not be available.

## Processing Funds

### Loan Process Flow

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



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



## Requesting Loan Changes

Beginning Sept. 1, 2023, a CAL can **never** exceed the amount approved by the THECB. A CAL can be increased up to the original THECB approved 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 before the disbursement from the THECB and the institution cancels the loan, but the student later becomes eligible during the loan period; or
- the institution has already returned funds to the THECB during the loan period but needs all or part of the funds reissued.

The institution can make certain predisbursement changes through the HelmNet Portal (see [HelmNet Change Transactions Instruction Guide](#)) or request changes, such as reinstatement, in writing through the THECB’s online contact form link, [Contact Us](#) (select "Financial Aid Question" as the contact reason). Loans can be increased or reinstated up to the original THECB approved 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.

## Loan Changes through Contact Us

### REQUIRED [CONTACT US](#) INQUIRY INFORMATION

Responses through *Contact Us* may take up to five business days to complete depending on the complexity of the request.

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

- Select Institution.
- Enter the Institution’s Full Name.
- Select “Financial Aid Question” as the contact reason (regardless of the inquiry reason).

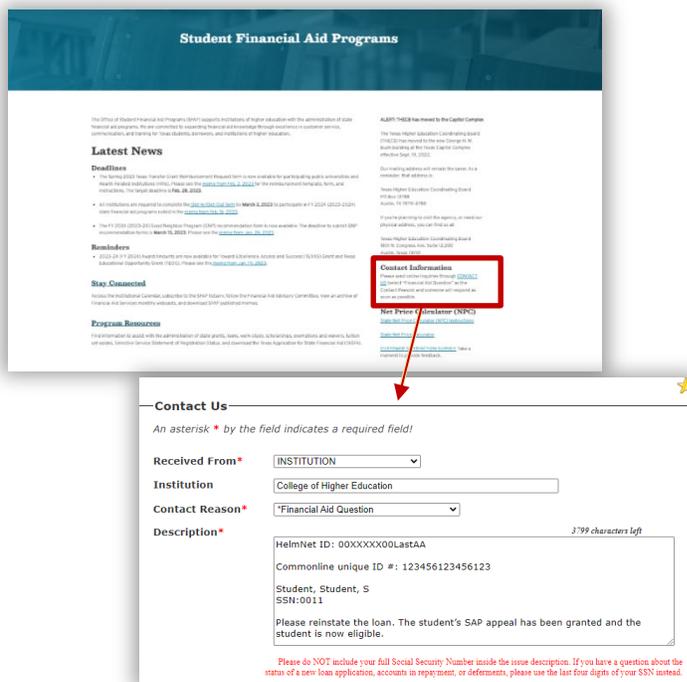
Enter the following information in the Description box:

- 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 Social Security number (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.”



## Reinstating Canceled Loans

Institutions can send a request in writing through the [Contact Us](#) link to reinstate a canceled loan or disbursement (select "Financial Aid Question" as the contact reason). Requests will be reviewed on a case-by-case basis. An [Institution Loan Verification of Enrollment](#) (VOE) form may be needed to process a reinstatement.

Common reasons why loans are canceled by the THECB include the following:

- 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.

## Returning Program Funds

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

**Note:** Institutions that submit an RFF should coordinate the refunds with their business office and use the [Electronic Funds Transfer](#) process. Funds returned to the THECB must align with the online form and cannot include cents.

## Timely Distribution of Funds ([TAC, Title 19, 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.

## Loan Reporting Tools

The **Online Reporting** feature within the HelmNet portal provides institutions a secure method to run and export student-level data for CAL. Administrators can access reports to identify applications that are ready for certification, pending disbursements, and various summaries. Review the [HelmNet Online Reporting manual](#) for detailed instructions on how to pull available reports.

## Repayment

The CAL has a six-month grace period for repayment of funds, 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 receive a 0.25% interest rate reduction on the interest rate of each applicable loan in repayment

### Annual Student Loan Debt Disclosure ([TAC, Title 19, 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 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; and
- \*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.

# FORWARD 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 relevant statutes and rules. The information in this document is to be used solely as a resource and does not override the statute or rules for this program.

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 1](#).

## **Program Authority and Purpose** ([TAC, Title 19, Section 22.175](#))

The Future Occupations & Reskilling Workforce Advancement to Reach Demand (FORWARD) Loan Program is part of the Hinson-Hazlewood College Student Loan Program, authorized by [TEC, Chapter 52, Subchapter A](#). Rules for administering the program can be found in [TAC, Title 19, Chapter 22, Subchapter J](#). The FORWARD Loan Program is a low-interest loan designed for students enrolled in programs aligned with high-value credentials and high-demand occupations. The program provides alternative educational loans to Texas students who are unable to meet the cost of attendance.

## **Eligible Institutions** ([TAC, Title 19, Section 22.178](#))

Public or private nonprofit institutions of higher education (including junior colleges) located in Texas, accredited by a recognized accrediting agency, as defined in [TEC, Title 3, Section 61.003](#), are eligible to participate in the FORWARD Loan Program.

## Program Eligibility

### Eligibility Requirements ([TAC, Title 19, Section 22.179](#) & [22.182](#))

<b>Students must:</b>	
<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="#">Selective Service Statement</a>);</li> <li>✓ have insufficient resources to finance their education;</li> <li>✓ meet the satisfactory academic 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> <li>✓ sign a promissory note and provide two references who live at separate addresses;</li> <li>✓ be enrolled in a <a href="#">high-demand credential program</a>; and</li> <li>✓ meet one of the following enrollment requirements:                             <ul style="list-style-type: none"> <li>• <b>Degree program:</b> must be enrolled in a degree program having completed at least 50% of the required coursework before receiving a FORWARD loan.</li> <li>• <b>Non-degree program:</b> must be enrolled in a non-degree program with a duration less than two years.</li> <li>• <b>Baccalaureate-master's degree program:</b> must be enrolled in master's degree coursework, with the master's degree as part of a combined baccalaureate-master's program approved by the institution.</li> </ul> </li> </ul>	
<b>Cosigners must:</b>	<b>Students and cosigners must meet the following credit approval requirements:</b>
<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; and</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>	<ul style="list-style-type: none"> <li>✓ Have an Experian VantageScore of 650 or higher</li> <li>✓ Do not have public records such as tax liens or bankruptcy proceedings</li> <li>✓ Have a minimum of four credit trade lines, excluding student loans or authorized user accounts</li> <li>✓ Have not defaulted on any federal or private education loans</li> </ul>

### Additional Information

#### 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.

#### Child Support Arrearages Per [Texas Family Code, Title 5, Section 231.006](#),

a student who is obligated to pay child support and is more than 30 days delinquent is not eligible to receive a state-funded grant or loan.

Institutions determine how to best comply with this state requirement and should work with their legal counsel on questions related to this statutory mandate.

## Satisfactory Academic Progress ([TAC, Title 19, Section 22.179](#))

A student must meet the minimum SAP requirements toward the eligible high-demand credential 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 FORWARD Loan. A student can receive a FORWARD Loan if an SAP appeal has been approved by the institution.

## Discontinuation of Eligibility ([TAC, Title 19, Section 22.180](#))

Eligibility for the program ends two years from the start of the semester in which the student received the FORWARD Loan.

### **ALERT: Changes to High-Demand Credential Programs**

If a high-demand credential program is no longer eligible after a student receives a FORWARD loan, they may continue to receive loans through the program if:

- the student continues to be enrolled in the credential program that was used to demonstrate initial eligibility for the program; and
- the student continues to meet all other eligibility criteria under [TAC, Section, 22.179](#).

## Hardship Provisions ([TAC, Title 19, Section 22.181](#))

A student who is ineligible for a FORWARD Loan may be eligible under a hardship provision based on one of the following provisions:

- The student is not meeting SAP requirements.
- The student is enrolled beyond the time limit restrictions relating to “Discontinuation of Eligibility.”

The institution will determine any acceptable reasons to grant a hardship decision. 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.

## Awarding

### Award Amounts ([TAC, Title 19, Section 22.183](#))

Students may only receive FORWARD Loan funding to cover reasonable expenses, not to exceed the cost of attendance (COA). When certifying a FORWARD Loan, institutions are confirming that the amount of the requested loan is \$100 or greater and does not exceed the difference between the cost of attendance and the financial resources available to the applicant (regardless of whether the student actually accepts the assistance).

The financial resources that must be considered when determining the amount of a FORWARD Loan eligibility include:

- free sources of student aid, such as gifts, grants, and scholarships; **AND**
- the amount of any Federal Direct 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 FORWARD Loan.

**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).

### 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).

#### **ALERT: Aggregate Loan Amount**

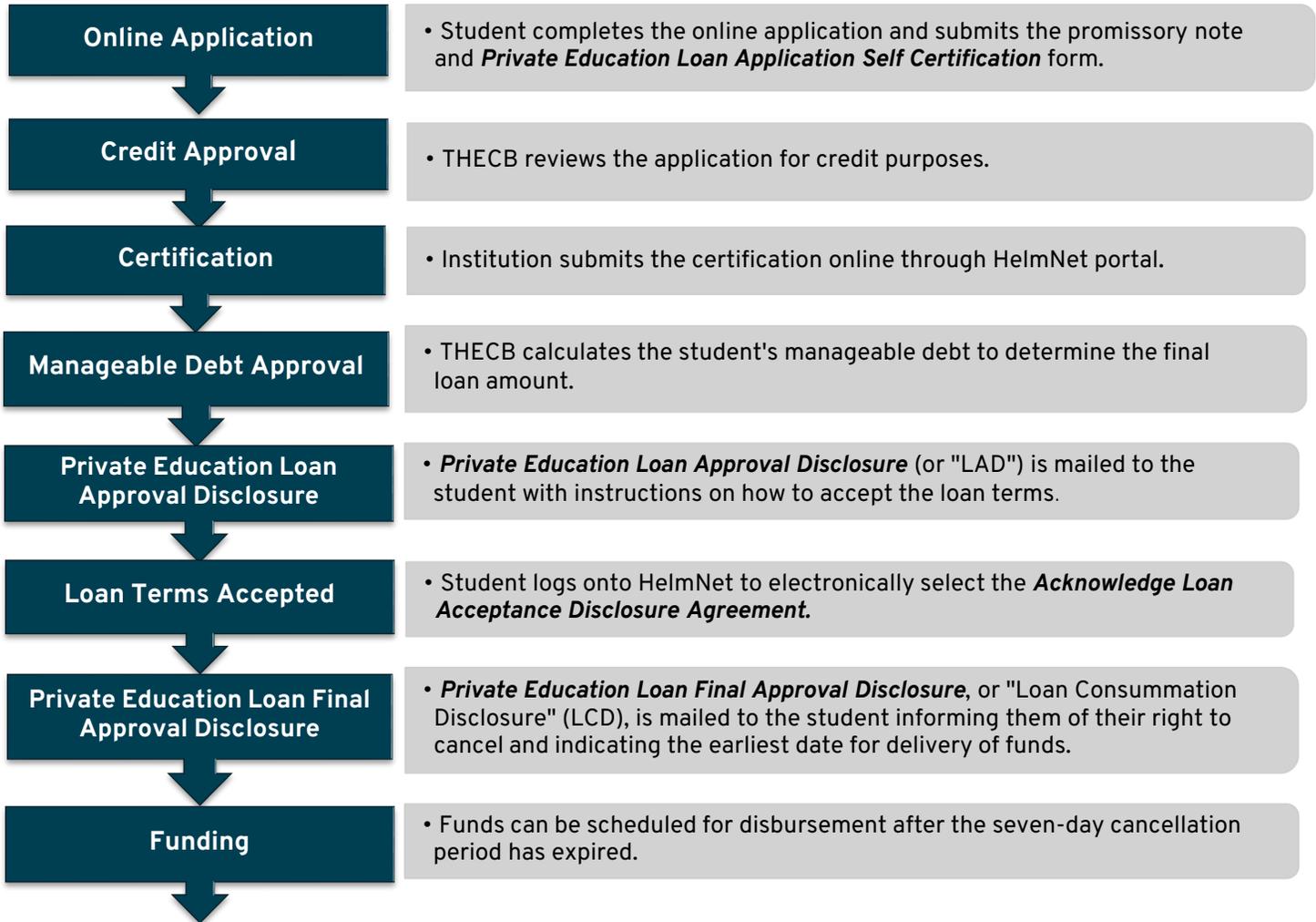
The THECB will calculate the final loan amount based on a student's "manageable debt" for the borrower's program of study. Depending on the calculation, the loan could be reduced or canceled by the THECB after the loan has been certified by an institution (see [TAC, Section 22.183\(a\)](#)).

The CommonLine loan process is not available for 2023-24. Institutions can only certify eligible FORWARD loans using the [HelmNet portal](#) and must submit a [User Access Form](#) to request access.

## Processing Funds

### Loan Process Flow

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



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



## Requesting Loan Changes

A FORWARD Loan can **never** exceed the amount approved by the THECB. A loan can be increased up to the original THECB approved 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 before the disbursement from the THECB and the institution cancels the loan, but the student later becomes eligible during the loan period; or
- the institution has already returned funds to the THECB during the loan period but needs all or part of the funds reissued.

The institution can make certain predisbursement changes through the HelmNet Portal (see [HelmNet Change Transactions Instruction Guide](#)) or request changes, such as reinstatement, in writing through the THECB’s online contact form link, [Contact Us](#) (select "Financial Aid Question" as the contact reason). Loans can be increased or reinstated up to the original THECB approved 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.

## Loan Changes through Contact Us

### REQUIRED [CONTACT US](#) INQUIRY INFORMATION

Responses through *Contact Us* may take up to five business days to complete depending on the complexity of the request.

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 Social Security number (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 cancel the loan.”
- Clear request: “Please cancel disbursement #1. The student’s SAP appeal has been denied and the student is not eligible.”

The image shows two screenshots. The top one is a webpage titled "Student Financial Aid Programs" with a "Contact Us" link highlighted in a red box. The bottom one is a "Contact Us" form with the following fields filled out:

- Received From\***: INSTITUTION
- Institution**: College of Higher Education
- Contact Reason\***: Financial Aid Question
- Description\***: HelmNet ID: 00XXXXXX0LastAA  
Commonline unique ID #: 123456123456123  
Student, Student, S  
SSN:0011  
Please cancel disbursement #1. The student’s SAP appeal has been denied and the student is not eligible.

A red arrow points from the "Contact Us" link in the website screenshot to the "Contact Us" form.

## Reinstating Canceled Loans

Institutions can send a request in writing through the [Contact Us](#) link to reinstate a canceled loan or disbursement (select "Financial Aid Question" as the contact reason). Requests will be reviewed on a case-by-case basis. An [Institution Loan Verification of Enrollment](#) (VOE) form may be needed to process a reinstatement.

Common reasons why loans are canceled by the THECB include the following:

- 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.

## Returning Program Funds

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

**Note:** Institutions that submit an RFF should coordinate the refunds with their business office and use the [Electronic Funds Transfer](#) process. Funds returned to the THECB must align with the online form and cannot include cents.

## Timely Distribution of Funds ([TAC, Title 19, 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 FORWARD Loan has a six-month grace period before repayment, which begins on the date the student ceases to be enrolled at least half-time (determined by the institution) in student's credential program. The FORWARD Loan will not be sold to another lender ([TAC, Title 19, Section 22.186](#)).

The monthly repayment amount is determined and calculated annually by the Commissioner of Higher Education, and is based on:

- the borrower's income, as demonstrated through federal income tax returns or acceptable documentation;
- the borrower's monthly accrued interest on loans through the program;
- the borrower's cumulative outstanding student loan principal balance; and
- the borrower's income threshold, if below a threshold where borrowers may be automatically placed in forbearance, as established by Texas Higher Education Coordinating Board staff in consultation with the Texas Workforce Commission.

**Note:** Borrowers who enroll in the automatic debit or Automatic Clearing House (ACH) payment service receive a 0.25% interest rate reduction on the interest rate of each applicable loan in repayment.

### Annual Student Loan Debt Disclosure ([TAC, Title 19, 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 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; and
- \*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 relevant statutes and rules. The information in this document is to be used solely as a resource and does not override the statute or rules for this program.

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** ([TAC, Title 19, Section 22.163](#))

The Texas Armed Services Scholarship Program (TASSP) is authorized by [TEC, Title 3, Chapter 61, Subchapter FF, Section 61.9771](#). Rules establishing procedures to administer the subchapter can be found in [TAC, Title 19, Chapter 22, Subchapter I](#). The purpose of the TASSP is to encourage students to complete a baccalaureate degree and become members of the Texas Army National Guard, Texas Air National Guard, Texas State Guard, United States Coast Guard, or United States Merchant Marine, or to become commissioned officers in any branch of the armed services of the United States.

## **Eligible Institutions** ([TAC, Title 19, Section 22.164](#))

Public institutions of higher education, as defined in [TEC, Title 3, Section 61.003\(8\)](#), and private or independent institutions of higher education, as defined in [TEC, Title 3, Section 61.003\(15\)](#), can participate.

## Program Eligibility

### Eligibility Requirements ([TAC, Title 19, Section 22.166 and 22.167](#))

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:

1. 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
2. Have a high school grade point average (GPA) of 3.0 or higher on a 4.0 scale
3. Have achieved a college readiness score on the SAT (1070) or ACT (23)
4. 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 [Selective Service Statement](#));
- ✓ 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; and
- ✓ enter into a written agreement with the THECB.

### Discontinuation of Eligibility ([TAC, Title 19, 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.

## Additional Information

### TASSP Nomination Process

- The student is responsible for seeking an appointment for TASSP by a Texas senator, representative, the lieutenant governor, or governor.
- Visit [hhloans.com](http://hhloans.com) for the steps on how a student can apply.
- Each legislator may have a different application process.
- If selected, the student will receive a Notice of Selection email.

### Certification Process

1. The student must submit their Notice of Selection to the financial aid office at the college they plan to attend.
2. The student must contact their college's financial aid office and complete any required school TASSP acknowledgement forms.
3. The financial aid office will certify the student's program eligibility with the THECB.
4. Once the THECB receives the institution's eligibility certification, the student will complete the TASSP application online at [hhloans.com](http://hhloans.com)

### Child Support Arrearages

Per [Texas Family Code, Title 5, Section 231.006](#), a student who is obligated to pay child support and is more than 30 days delinquent is not eligible to receive a state-funded grant or loan.

Institutions determine how to best comply with this state requirement and should work with their legal counsel on questions related to this statutory mandate.

## Promissory Note ([TAC, Title 19, 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;
  - the Texas Army National Guard, Texas Air National Guard, Texas State Guard, United States Coast Guard;
  - the United States Merchant Marine; or
  - another undergraduate officer commissioning program; and
- 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, a General Educational Development diploma, or its equivalent; and
- 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; or
  - a contract to serve as a commissioned officer in any branch of the armed services of the United States; and
- 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, United States Merchant Marine, or the branch of the armed services with which the student enters into a contract; and
- repay the scholarship according to the terms of the promissory note if the student fails to meet the requirements in the [Conversion of a Scholarship to a Loan](#) section.

## Awarding

### Award Amount and Limitations ([TAC, Title 19, Section 22.165](#))

The TASSP maximum award amount is determined and announced annually by the THECB.

2023-24 Award Maximums	
Institution Type	Annual Scholarship Maximum
Public and Private Institutions	Up to \$15,000

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**.

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 for that academic year.

### Alternate Process

Alternates apply to cases where the student has not yet been awarded. 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. The THECB will contact the nominating official who initially appointed the scholarship recipient and request an alternate recipient.

### Replacement Process

Replacements apply to cases where the student has been awarded a scholarship but no longer is eligible. 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 must notify their institution of their eligibility and complete their scholarship application; otherwise, the scholarship will be forfeited.

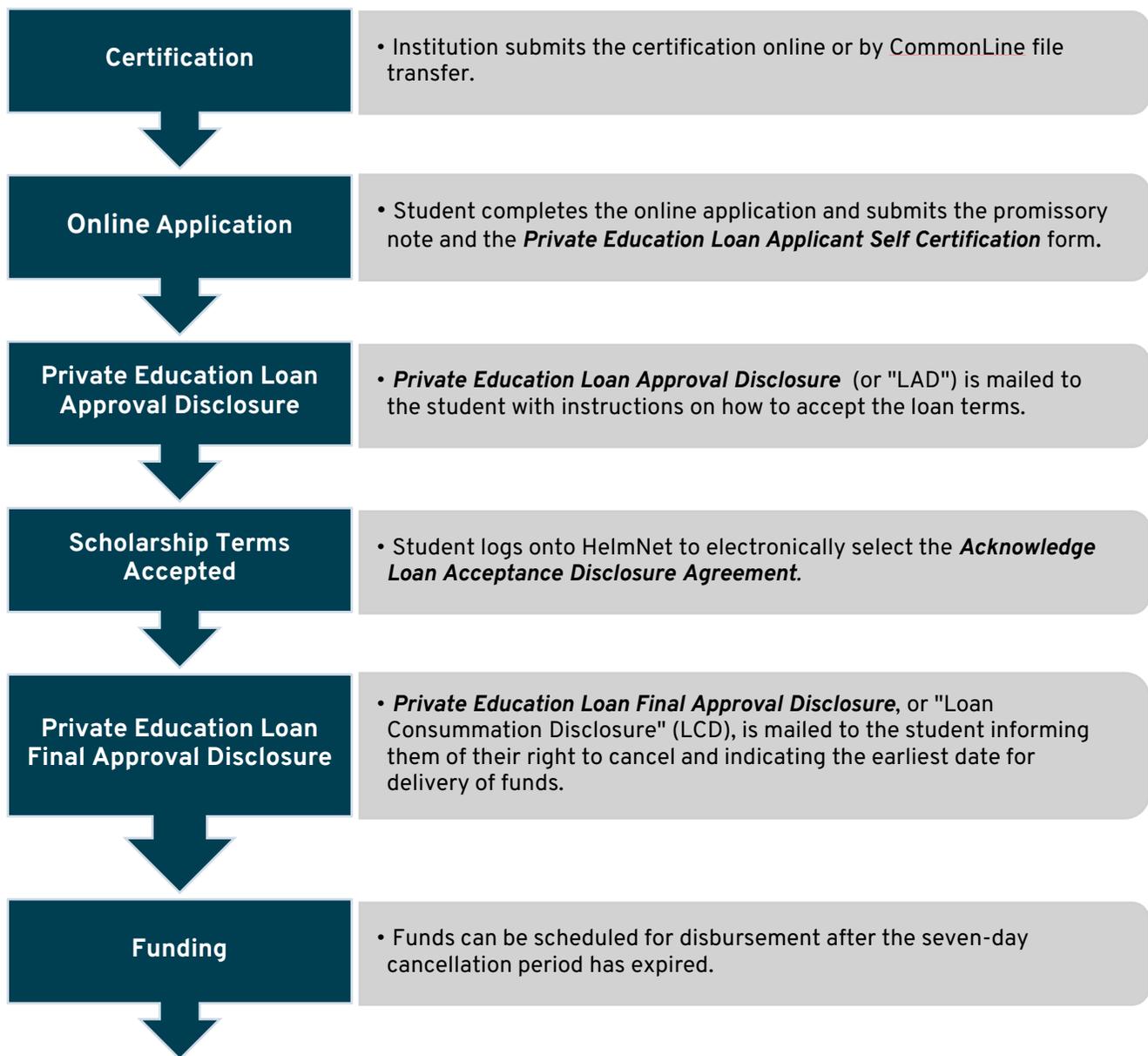
 **ALERT: Replacement Scholarships**

If a recipient’s scholarship converts to a loan before 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.

## 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.



**Note:** The earliest funds are disbursed is 9/01/23 due to when allocations are made available.

## Certifying Funds

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:

1. Certify the scholarship through the [HelmNet portal](#).
2. Submit a CommonLine Loan Certification File using the [MOVEit DMZ](#) secure file transfer portal.

## Returning Program Funds

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

**Note:** Institutions that submit an RFF should coordinate the refunds with their business office and use the [Electronic Funds Transfer](#) process. Funds returned to the THECB must align with the online form and cannot include cents.

## Timely Distribution of Funds ([TAC, Title 19, 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

REQUIRED [CONTACT US](#) INQUIRY INFORMATION

Responses through *Contact Us* may take up to five business days to complete depending on the complexity of the request.

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

- Select Institution.
- Enter the Institution’s Full Name.
- Select “Financial Aid Question” as the contact reason (regardless of the inquiry reason).

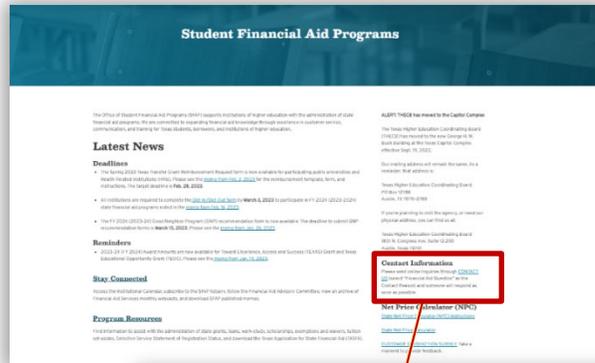
Enter the following information in the Description box:

- 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 Social Security number (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 update scholarship disbursement to 02-01-2023.”
- Clear request: “Please update scholarship disbursement #3 from 12-15-2022 to 02-01-2023.”



**Contact Us** ★

An asterisk \* by the field indicates a required field

Received From\*

Institution

Contact Reason\*

Description\*  3799 characters left

Please do NOT include your full Social Security Number inside the issue description. If you have a question about the status of a new loan application, accounts in repayment, or delinquency, please use the last four digits of your SSN instead.

# Repayment

## Conversion of a Scholarship to a Loan ([TAC, Title 19, 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; or
  - the minimum active service requirement included in a contract to serve as a commissioned officer in any branch of the armed services of the United States; honorable discharge is considered demonstration of fulfilling the minimum active service requirement; or
- 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 ([TAC, Title 19, Section 22.171](#))

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

- 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 **financial hardship** can apply for a forbearance in the form of postponed or reduces payments either verbally or by submitting a [General Postponement Request](#) to the THECB. Students experiencing a **medical disability**, can apply for cancellation of their TASSP loan by submitting a [TASSP Cancellation Request](#) form.

## 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 12 months.

**Note:** If a student is required to provide more than 12 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.

# Educational Aide Exemption Program

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

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** ([TAC, Title 19, Section 21.1080](#))

The Educational Aide Exemption (EAE) Program is authorized by [TEC, Title 3, Chapter 54, Section 54.363](#). Rules for administering the program can be found in [TAC, Title 19, Chapter 21, Subchapter II](#). The purpose of the EAE Program is to encourage certain Educational Aides to complete full teacher certification by providing need-based exemptions from the payment of tuition and certain mandatory fees at Texas public institutions of higher education.

## **Eligible Institutions** ([TAC, Title 19, Section 21.1082](#))

All public institutions, as defined by [TEC, Title 3, Section 61.003\(8\)](#), are invited annually to participate in the EAE program.

## Program Eligibility

### Initial Eligibility ([TAC, Title 19, Section 21.1083](#))

#### To receive an initial year award, a student must:

- ✓ be classified by the institution as a Texas resident;
- ✓ be registered with Selective Service, or be exempt (see [Selective Service Statement](#));
- ✓ have financial need;
- ✓ meet the institution's satisfactory academic progress (SAP) requirements;
- ✓ have been employed by a public school district in Texas working in the classroom directly with the students on a full-time basis as one of the following:
  - an Educational Aide\* for at least one school year, during the five years preceding the term or semester for which the student received the initial award, or
  - a substitute teacher for 180 or more full days during the five years preceding the term or semester for which the student received the initial award as defined in [TAC, Title 19, Section 21.1081\(5\)](#);
- ✓ be employed in some capacity by a public school district in Texas during the full term for which the student receives the award; and
- ✓ be enrolled in courses required for teacher certification in one or more subject areas experiencing a critical shortage of teachers at public schools in Texas, as determined by the Texas Education Agency (TEA).  
The [2023-24 critical shortage areas](#) include the following:
  - ✓ Bilingual/English as a Second Language – Elementary and Secondary Levels
  - ✓ Special Education – Elementary and Secondary Levels
  - ✓ Career and Technical Education – Secondary Level
  - ✓ Technology Applications and Computer Science – Elementary and Secondary Levels

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

#### To receive a renewal year award, a student must:

- ✓ meet all initial award requirements;
- ✓ meet the institution's financial aid grade point average (GPA) requirement for making satisfactory academic progress (SAP) towards a degree or certificate in accordance with the institution's policy; and
- ✓ if classified as an undergraduate, have not completed an excessive number of semester credit hours as defined in [TEC, Title 3, Section 54.014](#).

#### If the student received an EAE award before fall 2012, the student must:

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

## Additional Information

### Graduate Student Eligibility

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

### Financial Need

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

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

### School District Employee Eligibility

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

### Application Deadline

Students must submit the [2023-24 EAE Application](#) to the financial aid office before the end of the semester in which they are enrolled to be considered for an award.

### Child Support Arrearages

Per Texas Family Code, Title 5, Section 231.006, a student who is obligated to pay child support and is more than 30 days delinquent is not eligible to receive a state-funded grant or loan.

Institutions determine how to best comply with this state requirement and should work with their legal counsel on questions related to this statutory mandate.

## Discontinuation of Eligibility ([TAC, Title 19, Section 21.1083](#))

A student may **NOT** continue to receive this exemption in a subsequent semester or term if the student has attempted a number of undergraduate hours considered to be excessive under [TEC, Section 54.2001\(a\)\(2\)](#).

The excessive hours calculation **excludes** hours:

- earned exclusively by examination;
- earned for a course credit received toward the person's high school academic requirements;
- earned for developmental courses that the institution required the person to take under TEC, Title 3, Section 51.331; or
- described in TEC, Title 3, Section 61.0595(d).

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

## Hardship Provisions ([TAC, Title 19, Section 21.1088](#))

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

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

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

**NOTE:** A student who fails to earn a GPA that satisfies the institution's SAP requirement may have the ability to regain eligibility for this exemption if they meet the GPA requirement during a subsequent term or semester in which the exemption was not awarded. The student may also be granted a hardship exception by the institution.

## Exemption from Student Teaching ([TAC, Title 19, Section 21.1087](#))

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

## Awarding

All public institutions are invited annually to participate in the EAE Program by opting in or out of the allocation process. Those choosing not to participate will not be considered in the allocation calculation for the applicable award year. Those opting into the program will receive an even distribution of appropriated funds through the allocation process for the fiscal year.

Students enrolled in courses required for teacher certification in a critical shortage area and who meet all other eligibility requirements are eligible for an EAE award. Students receiving awards through the EAE Program will be exempted from the payment of the total resident tuition and required fees, other than laboratory and class fees, for courses taken during the applicable term. Institutions must determine the applicant’s eligibility to receive the exemption and notify both the applicant and the school district employing the applicant.

**NOTE:** An EAE award can only be applied to courses for which an institution receives formula funding. To determine which courses are formula funded, contact the institution’s registrar or data reporting official.

### Required Matching

Participation in the EAE Program requires that institutions use institutional funds (non-federal or state aid) to cover at least 10% of each recipient’s exemption.

**NOTE:** Institutions can contribute beyond the 10% minimum requirement.

Example	Total Tuition & Fees	Institutional Percentage (10% minimum)	Institutional Funds	EAE Award Amount (Tuition/Fees <i>minus</i> Institutional funds)
Institution A	\$5,000	10%	\$500	\$4,500
Institution B	\$5,000	20%	\$1,000	\$4,000
Institution C	\$5,000	30%	\$1,500	\$3,500

## Processing Funds

Institutions can begin submitting requests for funding on **August 15, 2023**. The THECB will begin processing funds *after* **September 1, 2023**. Institutions have *until* the close of business on **August 1, 2024**, to request program funds. An official notification will be sent to institutions in the summer to provide instructions on how to request funds for FY 2024.

# Bilingual Education Program

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

A copy of the General Appropriations Act, Senate Bill (SB) 1, Article III, Section 48, 88th Texas Legislature used to create these guidelines is available in [Appendix 1](#).

## Program Purpose

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

## Eligible Institutions

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

- University of North Texas
- University of North Texas at Dallas
- Texas Woman's University
- The University of Texas at Dallas
- The University of Texas at Arlington
- Texas A&M University - Commerce
- DFW Tech Teach, in consultation with Texas Tech University
- **New** The University of Texas San Antonio
- **New** The University of Texas El Paso
- **New** The University of Texas Rio Grande Valley
- **New** Texas A&M University- Kingsville
- **New** University of Houston - Clear Lake

## Program Eligibility

### Eligibility Requirements

**To receive an award, a student must:**

- ✓ be admitted at a participating institution to the Teacher Education Program in Bilingual Education or other comparable program for teacher education in English as a second language or Spanish;
- ✓ **Update** have demonstrated financial need, defined as cost of attendance minus the calculated EFC (see [TAC, Section 22.1\(14\)](#)); and
- ✓ maintain a minimum cumulative 3.0 grade point average.

 **ALERT: FY 2024 Rider Updates**

The 88th Texas Legislature amended the rider found in the General Appropriations Act for the Bilingual Education Program by:

- expanding the program to include an additional five eligible institutions;
- removing the passage of the “State Board for Educator Certification Bilingual Target Language Proficiency Test” as an eligibility requirement to receive an award; and
- updating the definition of financial need to align with the rules found under [TAC, Section 22.1\(14\)](#).

### Child Support Arrearages

Per [Texas Family Code, Title 5, Section 231.006](#), a student who is obligated to pay child support and is more than 30 days delinquent is not eligible to receive a state-funded grant.

Institutions determine how to best comply with this state requirement and should work with their legal counsel on questions related to this statutory mandate.

## Awarding

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

**Note:** Funding cannot be used to cover “other costs associated” with the Bilingual Education Program.

## Processing Funds

Institutions can begin submitting requests for funding on **August 15, 2023**. The THECB will begin processing funds *after September 1, 2023*. Institutions have *until* the close of business on **August 1, 2024**, to request program funds. An official notification will be sent to institutions in the summer to provide instructions on how to request funds for FY 2024.

## Reporting

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

- Bilingual Education Program student graduation rates
- Passage rates for the Texas Examination of Education Standards Bilingual Education Supplemental exam or the English as a Second Language Supplemental exam
- Graduate employment data at Texas public school districts
  - Number of Bilingual Education Program students employed after graduation in a Texas public school district
  - Names of Texas school districts employing Bilingual Education Program graduates

### Reporting Timeline

#### Graduation Employment Data

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

The THECB is required to collect Bilingual Education Program data for the 2024-25 biennium, which includes the 2023-24 (Fiscal Year 2024) and 2024-25 (Fiscal Year 2025) award years. **Report templates and due dates will be sent** to participating institutions for both the required biennium and end-of-year reports.

## Appendix 1: Selective Service [\(TAC, Title 19, Section 22.3\)](#)

Under [TEC, Title 3, Section 51.9095](#), an individual must file a statement of their Selective Service status with the institution confirming registration or exemption.

This statute applies to all state-funded financial aid, as well as “federal funds or gifts and grants accepted by this state.” The statement is required from students receiving federal aid or private donations that pass through the state Treasury or governor’s office (i.e., Governor’s Emergency Education Relief, or GEER), state-appropriated funds, or institutional funding, which includes programs funded by tuition set-asides, exemptions, and waivers.

**Any of the following can be used to meet the statutory statement requirement:**

- THECB Selective Service Statement of Registration Status ([English Statement](#) or [Spanish Statement](#))
- Printout from [SSS.gov](#) website
- Institutional Student Information Record (ISIR) if status is available\*
- THECB Selective Service Statement of Registration Status embedded in the Texas Application for State Financial Aid (TASFA)

\*As of FY 2023-24, registration status is no longer reported on the ISIR. Institutions can use any prior year ISIR that confirms registration to meet the statutory requirement for a student's status.

Institutions are **not** required to collect “proof” of registration or exemption from students or to verify the accuracy of the statement against external databases or other resources if conflicting information does not exist. See [Updated Guidance on Statutory Requirements that Impact Financial Aid Memo](#)).

### SELECTIVE SERVICE STATEMENT OF REGISTRATION STATUS

In accordance with [Texas Education Code, Section 51.9095](#), male students must file a Selective Service Statement of Registration Status with their institution or other entity granting financial assistance. For more information about the Selective Service System, visit [sss.gov](#).

Please mark **one** option below:

<input type="checkbox"/> I was born female and not required to register.	<input type="checkbox"/> I was born male and am <b>EXEMPT</b> from registration because: (please briefly explain why you are exempt in the box below.)
<input type="checkbox"/> I was born male and am under the age of 18 and not currently required to register.	<div style="border: 1px solid black; height: 100px; width: 100%;"></div>
<input type="checkbox"/> I was born male and am <b>REGISTERED</b> with the Selective Service.	
<input type="checkbox"/> I was born male and am over the age of 18. I am not registered with Selective Service and I am not exempt from registration with Selective Service.	

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

Student ID: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

*Complete and return to the Financial Aid Office at your institution of higher education.*

Selective Service Statement of Registration Status
As of 09/28/2021

### Additional Information

#### Collection Method

The institution has flexibility to create an online, paper, or alternate method to collect the statement as long as it uses the content developed and required by the THECB.

#### Frequency Collecting the Statement

If the student’s status will NOT change, the statement collected can be used for subsequent semesters at the same institution.

If the student is NOT registered for Selective Service, a statement must be collected each time they apply for financial aid or a student loan until the statement indicates registered or exempt.

#### Males Age 26 or Older

Individuals older than the maximum age at which an individual is required to be registered with the Selective Service System under federal law are not required to complete this status statement.

#### Retention Schedule

The status statement must be retained in the student’s record based on the retention schedule outlined in the institution's Program Participation Agreement (PPA).

## Appendix 2: TAC and TEC Archive

CONTACT FINANCIAL AID SERVICES	
By phone: (844) 792-2640	
Contact us by completing an <a href="#">online inquiry form</a> 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	<a href="#">Texas Administrative Code</a> <a href="#">TAC, Title 19, Chapter 22, Subchapter A [PDF]</a>
TEXAS Grant Program Rules and Statutes	<a href="#">TEC, Chapter 56, Subchapter M [PDF]</a> <a href="#">TAC, Title 19, Chapter 22, Subchapter L [PDF]</a>
TEOG Program Rules and Statutes	<a href="#">TEC, Title 3, Chapter 56, Subchapter P [PDF]</a> <a href="#">TAC, Title 19, Chapter 22, Subchapter M [PDF]</a>
TEG Program Rules and Statutes	<a href="#">TEC, Chapter 61, Subchapter F [PDF]</a> <a href="#">TAC, Title 19, Chapter 22, Subchapter B [PDF]</a>
Texas College Work-Study Program Rules and Statutes	<a href="#">TEC, Chapter 56, Subchapter E [PDF]</a> <a href="#">TAC, Title 19, Chapter 22, Subchapter G [PDF]</a>
CAL Program Rules and Statutes	<a href="#">TEC, Title 3, Chapter 52, Subchapter C [PDF]</a> <a href="#">TAC, Title 19, Chapter 22, Subchapter J</a>
FORWARD Loan Program Rules and Statutes	<a href="#">TEC, Title 3, Chapter 52, Subchapter C</a> <a href="#">TAC, Title 19, Chapter 22, Subchapter J</a>
TASSP Program Rules and Statutes	<a href="#">TEC, Title 3, Chapter 61, Subchapter F [PDF]</a> <a href="#">TAC, Title 19, Chapter 22, Subchapter I [PDF]</a>
Educational Aide Exemption Program Rules and Statutes	<a href="#">TEC, Chapter 54, Subchapter D [PDF]</a> <a href="#">TAC, Title 19, Chapter 21, Subchapter II [PDF]</a>
Bilingual Education Program	<a href="#">House Bill 1, Article III, Section 43, 88th Texas Legislature</a>

## Appendix 3: TEXAS Grant Frequently Asked Questions

**1. Can a student taking fewer than 6 semester credit hours 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 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 or early college credit hours when determining TEXAS Grant renewal eligibility?**

Yes. Dual credit hours or early college 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 or early college 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 the Texas Education Agency 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. Are institutions required to prorate awards?**

No. Institutions are not required to prorate awards. In November 2020, TAC provisions pertaining to proration were removed. Institutions have the flexibility to determine grant amounts and can prorate awards (up to the semester maximum) 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 (for example, Federal Supplemental Educational Opportunity Grant (FSEOG) or Texas Public Educational Grant (TPEG) could be used).

**2. Can a student enrolled only in Continuing Education Units (CEUs) 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 or early college credit hours when determining TEOG renewal eligibility?**

Yes. Dual credit hours or early college 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 or early college 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 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. Are institutions required to prorate awards?**

No. Institutions are not required to prorate awards. In November 2020, TAC provisions pertaining to proration were removed. Institutions have the flexibility to determine grant amounts and can prorate awards (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?

The 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 to return TEG 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. Are institutions required to prorate awards?

No. Institutions are not required to prorate awards. In November 2020, TAC provisions pertaining to proration were removed. Institutions have the flexibility to determine grant amounts and can prorate awards (up to the annual maximum) if the student meets all eligibility criteria.



## Appendix 7: CAL Frequently Asked Questions

### 1. Can institutions change disbursement amounts after a loan has been approved by the THECB?

Yes. Institutions can process changes to pending disbursements up to the original approved 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.

### 2. Can a student who is not meeting SAP appeal their SAP status and receive a CAL?

Yes. If a student is not meeting an 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.

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

No. Institutions should not place an academic hold related to a THECB delinquency (see [2019 THECB Academic Holds Discontinued for Delinquent Borrowers Memo](#)). Institutions have flexibility to place academic holds on student accounts that are unrelated to a state loan delinquency.

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.

### 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 8: TASSP Frequently Asked Questions

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

The difference between an alternate and replacement student appointment is as follows:

- 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 award 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 award be reinstated?

Yes. A TASSP award can be reinstated up to the original certified amount for any of the following reasons:

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

Reinstatement requests must be submitted in writing through the THECB’s online contact form link, [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 9: EAE Frequently Asked Questions**

- 1. If an applicant obtains one school year of full-time Educational Aide experience outside of Texas, does the experience count toward the eligibility requirements?**

No. Applicants must obtain their Educational Aide experience at a public school district or eligible charter school in Texas. While private charter school employees do not qualify, some charter schools in public school districts may qualify.

- 2. Is a volunteer in a school district eligible to participate?**

No. The student must be employed by a Texas public school district for the full term in which the exemption is received.

- 3. Are there a certain number of hours in which the applicant must be enrolled?**

No. The EAE award amount is based on the tuition and required fees for formula-funded (tax-supported) hours for which the applicant is enrolled (TEC, Section 54.2002).

- 4. If a student did not meet satisfactory academic progress requirements in the fall, are they eligible for a spring award?**

No. Students must meet institutional SAP requirements for each term a student is awarded. Therefore, a student who is not meeting institutional SAP requirements at the end of fall is not eligible for the spring award, unless granted a hardship.

A student may have the ability to regain eligibility for a future award if they meet the GPA requirement during a term in which the exemption was not awarded.

- 5. Can the EAE application be used as employment verification for more than one term?**

No. An application that includes the verification of employment must be completed for each term awarded.

- 6. Can a student receive the exemption if they enrolled in hours that are considered excessive as defined in TEC, Section 54.014?**

No. However, at the start of a semester or term, if an undergraduate student is attempting hours considered to be excessive, the student may continue to receive this exemption if granted a hardship extension by the institution.

## Appendix 10: Quick References

<b>CONTACT FINANCIAL AID SERVICES</b>	
By phone: (844) 792-2640	
Contact us by completing an <a href="#">online inquiry form</a> and select “Financial Aid Question” as the contact reason.	
<b>WEBSITES, PORTALS, AND GUIDES</b>	
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>
General scholarship information for students	<a href="#">HHloans Website</a>
Secure file transfer and processing portal	<a href="#">MOVEit DMZ Portal</a> <a href="#">MOVEit DMZ User Access Guide [PDF]</a>
Reporting program data portal	<a href="#">CBPass Portal</a> <a href="#">WSMP Institution Online Report Portal Guide [PDF]</a>
Texas Education Agency Critical Shortage Areas and Education Aide definition	<a href="#">2023-24 Critical Shortage Areas 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>
<b>FORMS AND INSTRUCTIONS</b>	
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>
EAE 2023-24 Application	<a href="#">EAE 2023-24 Application [PDF]</a>
Form for returning program funds	<a href="#">Loan Programs Online Return of Funds Form</a>
Institution Loan Verification of Enrollment (VOE) Form	<a href="#">Institution Loan Verification of Enrollment Form [PDF]</a>
<b>WORK-STUDY PROGRAMS REPORTING</b>	
Mentorship Program Spreadsheet for compiling data as a resource	<a href="#">Financial Report Template [XLSX]</a>
Mentorship Program Spreadsheet for compiling data to complete Annual Program Summary Report	<a href="#">Annual Program Summary Report Template [XLSX]</a>
Sample MOU	<a href="#">Sample MOU [PDF]</a>