

# **2022-23 Program Guidelines Toward EXcellence, Access, & Success Grant** (TEXAS Grant)

**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](#).

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## 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.

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## 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.

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## ELIGIBLE INSTITUTIONS ([TAC, Title 19, Section 22.227](#))

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

## 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 [Chapter 481, Health and Safety Code](#) (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 the 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.

#### **ALERT: 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.

## 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** or **TEOG Transfer Pathway** does not need to have their high school transcript evaluated.

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

## RENEWAL ELIGIBILITY REQUIREMENTS ([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 [Chapter 481, Health and Safety Code](#) (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 in [Chapter 481, Health and Safety Code](#) (Texas Controlled Substances Act), unless they meet **all** other eligibility requirements and **one** of the following conditions exists:

- The student received a certificate of discharge by the Texas Department of Criminal Justice or a correctional facility; or 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.

**STOP:** 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 Sep. 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 (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.

**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: \_\_\_\_\_

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

## 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 PLAN OF 4 YEARS OR LESS	IF ENROLLED IN A DEGREE PLAN OF MORE THAN 4 YEARS	ATTEMPTED HOURS**	HOURS WHILE RECEIVING GRANT FUNDS
<b>INITIAL RECIPIENT BY:</b> <ul style="list-style-type: none"> <li>ASSOCIATE DEGREE</li> </ul>	<b>3 years</b> from the first semester awarded	<b>4 years</b> from the first semester awarded	150 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>	<b>5 years</b> from the first semester awarded	<b>6 years</b> 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 nine SCH (but at least six SCH)
- 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.

 **STOP:** A student enrolled for fewer than six hours 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 includes 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



### STOP: 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 could 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.



## ELIGIBILITY

**UPDATED**

### SELECTIVE SERVICE STATEMENT (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 (GEER)), state-appropriated funds, or institutional funding, which includes programs funded by tuition set-asides, exemptions, and waivers.

#### **ALERT: Proof of Selective Service Status No Longer Required**

Institutions are no longer 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](#)).

**Note:** The THECB approved an amendment to TAC, Title 19, Section 22.3 during their quarterly meeting held on April 28, 2022.

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 imbedded in the Texas Application for State Financial Aid (TASFA)

### 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).



## 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 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 2022-23 is **\$6,454**.

### 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.

- The award maximum amount is \$5,379 per semester.
- A student could receive up to \$16,137 for the 2022-23 award year.
- Target awards are still encouraged (\$2,500 per semester = up to \$7,500).

### 2022-23 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	\$5,379	\$16,137	\$2,500	\$7,500

### **ALERT: Proration Requirements Removed**

The proration requirements found in the program rules (TAC) were removed in November 2020. Institutions have the discretion to determine grant amounts, up to the semester maximum.


## 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 TEA's Curriculum Standards and Student Support Division at <a href="mailto:curriculum@tea.texas.gov">curriculum@tea.texas.gov</a>.</p>	

## REQUIRED MATCHING ([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. Funds used for this purpose are frequently referred to as “matching funds.”

 **ALERT:** A **Required Fee**, for the purpose of administering the TEXAS Grant Program, includes mandatory fees (required by statute), 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.

### REQUESTING AND RETURNING PROGRAM FUNDS

To complete an online form to request or return state grant funds, an administrator must create an account through [CBPass](#). Once the account is created, the administrator can request access in CBPass to the Grant Payment Portal (GPP) application.



### CBPASS GRANT PAYMENT PORTAL INSTRUCTIONS

#### REGISTRATION PROCESS

Administrators must start the process of setting up a CBPASS account and requesting access to the GPP by following the steps below:

##### Step 1: Create CBPASS Profile.

- To access CBPass, navigate to the following website: <https://www1.highered.texas.gov/CBPass/default.cfm>.
- Click the **create one now!** link under the **Sign In** button to initiate a new account.
- Follow the steps in the [CBPASS Quick Start Guide](#).
- Make sure that when you create your profile, you affiliate to your correct school and FICE Code.

The screenshot shows the CBPass Login page. It has a title 'CBPass Login' and a subtitle 'Sign in with your CBPass Account'. There are input fields for '\*Username:' and '\*Password:'. A 'Sign In' button is to the right of the password field. Below the password field is a link 'Forgot your Username or Password?'. At the bottom, it says 'don't have an account?' followed by a red-bordered link 'create one now!'.

##### Step 2: Request GPP Access.

- Log into the CBPass portal.
- Click on **My Access**.
- Navigate to the **Click to Request Access to another application** hyperlink.
- Choose **Grant Payments** in the application drop-down listing.
- Click on the **Request Access** button.

The screenshot shows the 'MY ACCESS' tab in the CBPass portal. It has a search bar and a table of applications. A red box highlights the link 'Click to Request Access to another application'. A red arrow points from this link to a 'Request Access' modal window. The modal has a 'Select Application:' dropdown menu and a red-bordered 'Request Access' button. The background table shows applications with IDs 140, 139, and 130, and names like 'Data Use Agreement', 'Financial Aid Data Certi', and 'Good Neighbor Program'.

**! ALERT:** Once an application has been requested, the THECB will email the institution's Director of Financial Aid to request approval. Once approved, the THECB will email the user confirming account access and the user can log into CBPass to launch the GPP application.

## REQUESTING FUNDS

Institutions can **begin submitting** requests for funding on **August 1, 2022**. The THECB will **begin processing** funds *after September 1, 2022*. Institutions have *through August 1, 2023*, to request program funds.

To request funds:

- Log into the [CBPass/Grant Payment Portal](#).
- Select **Request Funds** on the menu located on the top banner.
- Enter the **Amount** of funds being requested (do not include special characters).
- Enter the **Student Count** (this includes both initial and renewal students).
- Hit **Submit Request**.
- A pop-up message will confirm a successful submission.

**Note:** Instructions are bulleted at the bottom on the webpage to clarify request options and adjustments.

**⚠️ ALERT:** Only include a student one time in the **Student Count** during the applicable award year. For example, if a student has two disbursements (fall and spring), the institution will only submit the student once to THECB, not for each disbursement.

## CANCELING A REQUEST

Check the **Transaction Details** tab to see the status of your request in GPP. If the status is **Waiting Approval** or **Pending**, call Financial Aid Services at 844-792-2640 to cancel the transaction. If the status is **Disbursed**, the receiving institution will need to complete a refund for amount that is not needed once the funds are received at the institution.

ID	Year	Status	Amount	Student Count	Date
Request-20-00###-10012019-4	2020	Pending	\$150,000.00	60	10/01/2019 8:00:00 AM
Request-20-00###-09252019-3	2020	Waiting Approval	\$200,000.00	80	09/25/2019 8:00:00 AM
Request-20-00###-09202019-2	2020	Disbursed	\$1,800,000.00	720	09/20/2019 8:00:00 AM
Returned-20-00###-09152019-2	2020	CB Waiting for Funds	\$50,000.00	0	09/15/2019 8:00:00 AM
Returned-20-00###-09102019-1	2020	Returned	\$10,000.00	4	09/10/2019 8:00:00 AM
Request-20-00###-09052019-1	2020	Disbursed	\$1,000,000.00	380	09/05/2019 8:00:00 AM

## RETURNING FUNDS

To complete a return of funds form:

- Log into the [CBPass/Grant Payment Portal](#).
- Select **Return Funds** on the menu located on the top banner.
- Enter the **Amount** of funds being returned (do not include special characters).
- Enter the **Student Count** (this includes both initial and renewal students), if applicable.
- Enter **Comments** to explain the reason for the return.
- Hit **Submit** request.
- A confirmation will be displayed at the top of the screen to confirm a successful submission.

The screenshot shows the 'Return of Funds' form in the GPP system. The top banner has 'Return Funds' highlighted. The form fields include 'Appropriation Year' (2022), 'Program Type' (TEXAS Grant), 'Amount Returned' (with a dollar sign), 'Student Count', and 'Comments'. A 'Submit Request' button is in the bottom right corner. A 'Pending Return: \$0.00' message is at the top right of the form area.

**Note:** Institutions that submit a return of funds form through the GPP 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.

## STUDENT COUNT CHANGES

The **Student Count** can be increased or decreased at any point by the institution during the current award year.

- **To increase the Student Count:**
  - Enter the number of students being added (the difference) under the **Request Funds tab**.
  - Enter \$0 for the amount of funds being requested.

**Example:** The Student Count reported in GPP is **100** students, but the institution has actually paid **120** students grant funds for the award year. To add the additional 20 students into the GPP, enter **20** in the Student Count on the Request Funds tab and **\$0** for the amount of funds being requested. This will increase the total Student Count from 100 to 120.

- **To decrease the Student Count:**
  - Enter the number of students being reduced (the difference) under the **Return Funds tab**.
  - Enter \$0 for the amount of funds being returned and a comment to clarify changes to the Student Count.

**Example:** The Student Count reported in GPP is 100 students, but the institution has only paid 80 students grant funds for the award year. To reduce the total reported in the GPP, enter 20 in the Student Count on the Request Funds tab and \$0 for the amount of funds being refunded. This will decrease the total Student Count from 100 to 80.

### 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 FUNDS ([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 [Authority to Transfer form](#). The form will not be available until Fall 2022. The Financial Aid Services staff will respond to the institution to provide next steps for the process. Institutions requesting a transfer of funds must submit a request by **July 1, 2023**.

 **ALERT:** The allowable amounts for the Authority to Transfer Funds process have changed from 10% to 25% and from \$20,000 to \$60,000 as a result of legislation in the 87th Legislative Session.

**Note:** The THECB approved an amendment to [TAC, Title 19, Section 22.11](#) during their quarterly meeting held on April 28, 2022.



# APPENDIX 1: FREQUENTLY ASKED QUESTIONS

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## 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.

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## 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.

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## 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.

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

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

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## 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.

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

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

## APPENDIX 2: QUICK REFERENCES

### CONTACT FINANCIAL AID SERVICES

By phone: (844) 792-2640

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

### PROGRAM RULES AND STATUTES

Texas Program Statutes	<a href="#">Texas Education Code TEC, Chapter 56, Subchapter M [PDF]</a>
Texas Program Rules	<a href="#">Texas Administrative Code TAC, Title 19, Chapter 22, Subchapter A [PDF]</a> <a href="#">TAC, Title 19, Chapter 22, Subchapter L [PDF]</a>

### WEBSITES, PORTALS, AND GUIDES

General program information for institutions	<a href="#">Student Financial Aid Programs Information Webpage</a>
General college enrollment and financial aid information for students	<a href="#">College for All Texans</a>
Request and return funds, modify student count, and search student award history	<a href="#">CBPass Grant Payment Portal</a> <a href="#">CBPass Quick Start Guide [PDF]</a>
Secure file transfer and processing portal	<a href="#">MOVEit DMZ Portal</a> <a href="#">MOVEit DMZ User Access Guide [PDF]</a>

### FORMS AND INSTRUCTIONS

Form for adding, updating, or removing a user's access for state financial aid web portals	<a href="#">User Access Form [PDF]</a>
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>