

This resource document gives eligible public institutions step-by-step instructions on how to complete the [Spring 2023 Transfer Grant Reimbursement Request Form](#).

Requesting Reimbursement

Step One: Download the [Transfer Grant Reimbursement Template](#).

Verify enrollment eligibility before adding a student to the Transfer Grant Reimbursement spreadsheet.

A. Enter the following for the requesting institution:

- Institution Name
- Total Disbursed Amount (This field will Auto Populate)

Institution Name:	Type "Institution Name" in this field.	Total Disbursed Amount:	\$	Auto Populated
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Complete each data field below for **ALL** eligible students who received a Texas Transfer Grant disbursement.

NOTE: When entering data that begins with a zero, include an apostrophe (') before the leading zero.

- Example #1: FICE 012345 would be entered as '012345.

- Example #2: SSN 023456789 would be entered as '023456789.

Spring 2023 Reimbursement Recipient Data							
To receive reimbursement, a student must have been enrolled in at least nine semester credit hours (SCHs) through institutional census.							
FICE	SSN	LastName	FirstName	DOB	# Hours Enrolled through census	Disbursed Amount	Explanation - <u>ONLY</u> if Disbursed Amount is less than \$5000
123456	123456789	Example: Doe	John	19990406	9	\$ 5,000.00	
023456	023456789	Example: Doe	Jane	19990302	9	\$ 4,500.00	COA exceeded due to excess amounts in other need based.

B. Enter the following identifiers for **ALL** recipients:

- Institution FICE (6-digit)
- Social Security Number (no dashes)
- Last Name
- First Name
- DOB (Format: YYYYMMDD)
Example: Enter April 6, 1999, as **19990406**.
- # Hours Enrolled **through census**
 - Recipient **MUST** have been enrolled in at least nine semester credit hours (SCHs) through census to receive reimbursement.
- Disbursed Amount (Total amount disbursed in Spring 2023)
- Explanation - Enter comments **ONLY** if the disbursed amount is less than \$5000.

NOTE: When entering data begins with a zero, include an apostrophe () before the leading zero.

C. Save the file in the following format: **6-digit FICE_Institution_SemesterYYYY**

Example: 012345_ABCUniversity_Spring2023

Contact Information

For questions, contact Financial Aid Services at 844-792-2640 or [CONTACT US](#) (select "Financial Aid Question" under Contact Reason).

Step Two: Complete the [Reimbursement Request Form](#).

- A. Select the **Institution Type** (Public University or Health Related Institution-HRI) from the drop-down menu.
- B. Select the **Institution FICE, Name, and Allocation Amount** from the drop-down menu.
- C. Enter the total **Reimbursement Amount**.
 - Must use whole dollar amounts and round up to the nearest dollar.
 - Do not include special characters, commas, or dollar signs.
- D. Enter the **Student Count** (# of recipients) submitted for reimbursement.
 - Do not include special characters or commas.

The screenshot shows the 'Spring 2023 Transfer Grant Reimbursement Request Form' with the following fields highlighted by a red border:

- Institution Type ***: A dropdown menu with 'Select' as the current value.
- Institution FICE, Name, and Allocation Amount ***: A dropdown menu with 'Select' as the current value.
- Reimbursement Amount**: A text input field.
- Student Count ***: A text input field with a note: 'Enter the count of recipients submitted for reimbursement. Do not include special characters or commas.'



Check the **Final Request** box when submitting your FINAL request for reimbursement.

Check this box if this is your final request for reimbursement.

Final Request for Reimbursement of Spring 2023 Transfer Grant Awards

Step Three: Upload Transfer Grant Reimbursement File

- A. Upload a copy of your institution's reimbursement file that contains a list of ALL eligible students who received a Texas Transfer Grant disbursement.
- B. Click **browse files** to upload your saved file or **Drag and drop** a copy into the file upload box.

Recipient File Upload *

Upload a copy of your institution's Transfer Grant Reimbursement file that contains a list of ALL eligible students who received a Texas Transfer Grant disbursement.

Drag and drop files here or [browse files](#)

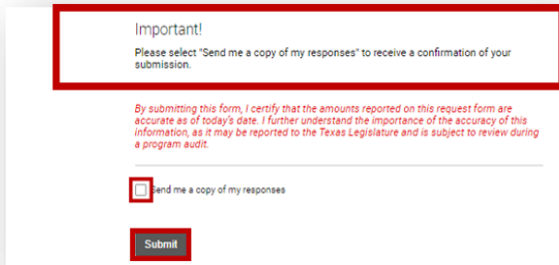
Contact Information

For questions, contact Financial Aid Services at 844-792-2640 or [CONTACT US](#) (select "Financial Aid Question" under Contact Reason).

Step Four: Submit the Reimbursement Request Form

Certifying Official must complete every field in the **Requestor Contact Information Section**.

- A. Click the box above the **Submit** button to receive a copy of your responses.
- B. Click **Submit** to send to the THECB.



The screenshot shows a form section with a red border around the top part. It contains the following text: "Important! Please select 'Send me a copy of my responses' to receive a confirmation of your submission." Below this is a red warning: "By submitting this form, I certify that the amounts reported on this request form are accurate as of today's date. I further understand the importance of the accuracy of this information, as it may be reported to the Texas Legislature and is subject to review during a program audit." At the bottom of the section, there is a checkbox labeled "send me a copy of my responses" and a red "Submit" button.

Note: A confirmation and copy of responses (if the box is selected) will be automatically sent to the email address listed in the Requestor Contact Information section upon submission. Institutions can submit multiple Request for Reimbursement Forms to process extremely large sets of students.

Tip on Form Submission

Institutions can submit multiple reimbursement request forms to process a large group of students in multiple batches.

Contact Information

For questions, contact Financial Aid Services at 844-792-2640 or [CONTACT US](#) (select "Financial Aid Question" under Contact Reason).

Returning Funds

To return program funds, complete the online [Return of Funds Form \(RFF\) for Grants and Special Programs](#).

The following fields **must** be entered to submit this form:

- **FICE Code** (6-digit)
- **Institution Name**
- **Contact Information** for the following positions:
 - Financial Aid Director
 - Reporting Official
 - Business Office Contact
- Select **2022-2023** for the Award Year
- Select **GEER TX Transfer Grant** for the Program
- **Detailed Refund Explanation**
 - In addition to the required explanation, include the following information for each student impacted by the return of funds.
 - First and Last Name
 - SSN(no dashes)
 - DOB(YYYYMMDD)

Example: February 1, 1999, should be entered as 19990201
- **Amount** (to be reimbursed by THECB)
- **Number student awards being refunded**
- **Certifying Official Name and Title**
- **Date**
- Click **Submit**

The screenshot shows the RFF form with several fields highlighted in red boxes to indicate required information. These include: Date (08-04-2022), FICE Code, Institution, Contact Information table, Award Year (2022-2023), Program (Geer TX Transfer Grant), Grant Program breakdown table, Detailed Refund Explanation Required section with an example, Special Program section, and the Summary section. A red box in the Summary section states 'Summary fields are AUTO POPULATED.'

Tips on Completing the RFF:

- A program must be selected from the drop down menu in order to insert data into the **Grant Program** section.
- Do not enter the student count for a partial refund. If a student received any portion of the award, student count is **NOT** impacted and does not need to be reported on the RFF.
- If any required information is missing, an error message will appear. Enter any missing information and select **SUBMIT**.
- Once the RFF is submitted, a confirmation email, including a copy of the request, will be sent to the institutional representatives listed in the Contact Information section.

Contact Information

For questions, contact Financial Aid Services at 844-792-2640 or [CONTACT US](#) (select "Financial Aid Question" under Contact Reason).