

2017-18 Program Guidelines Toward EXcellence, Access, & Success Grant

(TEXAS Grant)



State Financial Aid Programs
Texas Higher Education Coordinating Board

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TOWARD EXCELLENCE, ACCESS AND SUCCESS GRANT

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

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

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

STATE PRIORITY DEADLINE ([TEC, SECTION 56.008](#) and [19 TAC, SECTION 21.10](#))

The THECB provides a uniform priority deadline for applications that qualify for financial assistance in an academic year. General Academic Teaching Institutions (GATIs) in Texas **must** publicize and use **March 15** as the state priority deadline for identifying eligible students to be given priority in receiving awards through the state financial aid programs. All other public institutions are *encouraged* to use this state priority deadline. Institutions have the flexibility to define what it means to meet the priority deadline at their institution. Institutions are encouraged to adopt a policy and procedure to ensure students are awarded consistently for this program.

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

With the exception of public state colleges, GATIs and Health-Related Institutions (HRIs) are eligible to make both initial year (IY) and renewal year (RY) awards from a single allocation. Community colleges, public state colleges, and public technical institutes may only issue RY awards to students who received an IY award prior to fall 2014 through a community college, public state college, or public technical institute.

ELIGIBILITY

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

TO RECEIVE AN IY AWARD, A STUDENT MUST:

- ✓ Be classified by the institution as a Texas resident
- ✓ Be registered with Selective Service or be exempt
- ✓ Have applied for any available financial aid assistance
- ✓ Demonstrate financial need
- ✓ Have a 9-month expected family contribution (EFC) of no more than **\$5,430**
- ✓ Be enrolled at least 3/4 time
- ✓ Not have earned a baccalaureate degree
- ✓ Be enrolled in a baccalaureate degree program at a public 4-year or HRI institution as a first-time undergraduate and qualify through one of the following four pathways:
 - **High School Graduation Pathway:** Graduation from an accredited public or private high school* in Texas and enrollment at an approved institution within 16 months after high school graduation. The student may not have accumulated more than 30 semester credit hours (SCHs) (excluding credits for dual enrollment or by examination); **OR**
 - **Associate Degree Pathway:** Enrollment in an eligible institution within 12 months after earning an associate degree from a public or private nonprofit Texas institution of higher education ; **OR**
 - **Honorable Military Discharge Pathway:** Enrollment in an eligible institution of higher education within 12 months after being honorably discharged from military service. Enlistment in the military must have occurred within 12 months after graduation from an accredited public or private high school in Texas on May 1, 2013 or later; **OR**
 - **TEOG Transfer Pathway:** Completion of at least 24 SCHs with a minimum 2.5 GPA after receiving an IY Texas Educational Opportunity Grant (TEOG) in Fall 2014 or later and transferring to an eligible institution with a minimum 2.5 GPA.
- ✓ Not have been convicted of a felony or crime involving a controlled substance or under the law of any jurisdiction involving a controlled substance as defined by [Chapter 481, Health and Safety Code](#) (Texas Controlled Substances Act)

*To determine eligibility for a student that graduated from a private high school in Texas, the institution of higher education must receive a certification form from the 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.

ADDITIONAL INFORMATION

HIGH SCHOOL RECIPIENT

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

INITIAL RECIPIENT

If an initial TEXAS Grant recipient is paid funds but is later selected for verification (or voluntarily submits documentation) resulting in a new EFC that exceeds the maximum (\$5,430) requirement, the award must be cancelled. Funds should be awarded to another eligible student when possible.

TRANSFER STUDENTS

A student that is eligible through either the **Associate Degree** or **TEOG Transfer Pathway** does not need to have his or her high school transcripts evaluated but cannot receive priority consideration for an initial TEXAS Grant award.

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

TO RECEIVE A RY AWARD, A STUDENT MUST:

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

CONTROLLED SUBSTANCE RESTRICTIONS ([19 TAC, SECTION 22.230](#))

A student is not eligible to receive a TEXAS Grant award if convicted of a felony or an offense under the law in any jurisdiction involving a controlled substance as defined in [Chapter 481, Health and Safety Code](#) (Texas Controlled Substances Act). Institutions should consult with their legal counsel concerning questions about individual cases.

A person with a controlled substance conviction or offense can be considered for an award if **one** of the following conditions exists:

- A certificate of discharge by the Texas Department of Criminal Justice or a correctional facility has been issued.
- The person completed a period of probation ordered by a court, and at least two years have elapsed from the date of the receipt or completion.
- The person has been pardoned and the record of the offense has been expunged from the person's record.

ADDITIONAL INFORMATION

NEED ELIGIBILITY

If the student receives assistance that was not taken into account when determining the calculated need and the resulting sum of the assistance causes the student's need to be exceeded, the TEXAS Grant award must be adjusted if the sum of the excess resources is greater than \$300.

GRADUATE HOURS

An undergraduate student who is enrolled in both graduate and undergraduate hours is eligible for a TEXAS Grant award if all other eligibility requirements are met and the combined number of hours meets the 3/4 time enrollment condition.

CONTROLLED SUBSTANCE

To comply with the controlled substance requirement, institutions must collect a statement (electronic or paper) from each TEXAS Grant recipient certifying that the he or she has not been convicted of a crime involving a controlled substance. Institutions have the flexibility to determine the wording of the statement and the frequency that it is collected. This statement must be retained with the student's records for 7 years.

DISCONTINUATION OF ELIGIBILITY ([19 TAC, SECTION 22.230](#))

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

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

****Attempted hours** is defined as every course in every semester for which a student has been registered as of the official census date. This includes but is not limited to repeated courses, courses the student drops, or those from which the student withdraws. For transfer students, the transfer hours and hours for optional internship and cooperative education courses are included if they are accepted, by the receiving institution, as counting towards the student's current program of study ([See 19 TAC, Section 22.230](#)).

HARDSHIP PROVISIONS ([19 TAC, SECTION 22.231](#))

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

 **Alert:** If the institution determines it is appropriate, a hardship award can be issued to a student who is enrolled in fewer than 9 hours in the last two semesters of his or her degree program, due to impending graduation.

SATISFACTORY ACADEMIC PROGRESS (SAP) (19 TAC, SECTION 22.229)

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

At the end of the second academic year, and all years thereafter, a student must have completed 24 SCH in the academic year and have a minimum 2.5 cumulative GPA.

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

ACADEMIC YEAR	SATISFACTORY ACADEMIC PROGRESS (SAP) REQUIREMENTS	
END OF 1ST ACADEMIC YEAR	Institution SAP policy	
END OF 2ND ACADEMIC YEAR OR LATER	24 SCH in the most recent academic year	2.5 cumulative GPA on a 4-point scale

AWARDING

If appropriations for the TEXAS Grant program are insufficient to allow awards to all eligible students, first priority will be given to students that are eligible for a RY award (See [19 TAC, Section 22.232](#)).

In determining who should receive an IY TEXAS Grant award, an institution must give highest priority to students who demonstrate the greatest financial need at the time the award is made (See [19 TAC, Section 22.233](#)).

After all eligible continuation awards have been funded; remaining allocations should be awarded to IY students in a manner that acknowledges the Priority Model and priority deadline expectations:

- Students meeting the Priority Model requirements who also meet the March 15 state priority deadline should be awarded first.
- If funding remains, the next students to be awarded are those who met the March 15 state priority deadline, but who did not meet the Priority Model requirements.
- The balance of remaining funding can be awarded to any eligible student

Institutions are encouraged to use the target award amounts to assist as many students as possible.

TEXAS GRANT 2017-18 AWARD MAXIMUMS				
INSTITUTION TYPE	YEAR MAX	SEMESTER MAX	TARGET YEAR MAX	TARGET SEMESTER MAX
PUBLIC UNIVERSITIES, HRIS	\$9,050	\$4,525	\$5,000	\$2,500
PUBLIC STATE COLLEGES	\$5,666	\$2,833	\$5,000	\$2,500
PUBLIC TECHNICAL INSTITUTES	\$5,496	\$2,748	\$2,500	\$1,250
PUBLIC COMMUNITY COLLEGES	\$3,010	\$1,505	\$1,325	\$663

ADDITIONAL INFORMATION

IMPORTANT NOTE:

A student who is below the SAP requirements at the end of the academic year can appeal to have transfer courses included in the SAP calculation. In this case, all transfer courses must be included when determining program eligibility. Student award history is available to assist institutions with monitoring this requirement via the [Student Financial Aid Programs Information Website](#).

SAP 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.

FAILING COURSES

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

PRIORITY AWARD MODEL REQUIREMENTS ([19 TAC, SECTION 22.228](#))

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

AREA	HIGH SCHOOL GRADUATION REQUIREMENTS
ADVANCED ACADEMIC PROGRAM	<ul style="list-style-type: none"> • 12 Hours of College Credit (Dual Credit or AP Courses), • Complete The Recommended or Advanced High School Program or Its Equivalent • Complete The International Baccalaureate (IB) Program
TSI READINESS	<ul style="list-style-type: none"> • Meet the Texas Success Initiatives (TSI) assessment thresholds or qualify for an exemption
CLASS STANDING	<ul style="list-style-type: none"> • Graduate in the top 1/3 of the HS graduating class • Graduate with a GPA of at least 3.0 on a 4-point scale
ADVANCED MATH	<ul style="list-style-type: none"> • Complete at least one math course beyond Algebra II • Complete at least one advanced career and technical course, as determined by the Texas Education Agency (TEA)

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

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

OVER AWARDS ([19 TAC, SECTION 22.234](#))

If an award has been disbursed and a student receives other assistance that exceeds the student’s financial need, the institution is not required to adjust the award unless the sum of the excess resources is greater than \$300.

LATE DISBURSEMENTS ([19 TAC, SECTION 22.235](#))

Funds that are disbursed after the end of a student’s period of enrollment must be used either to pay the student’s outstanding balance for the period of enrollment, or to make a payment on an outstanding loan received during that period of enrollment. Under no circumstances should funds be released directly to the student in this situation.

ADDITIONAL INFORMATION

PRIORITY

There is no hierarchy within the priority model areas. However, there is a priority deadline of March 15th. Institutions are required to give priority for IY TEXAS Grant funds to students meeting the priority model requirements and the priority deadline. If funds remain after all eligible priority students meeting the priority deadline have been awarded, the balance of funds can go to students meeting the basic requirements.

MATCHING

A student, who is a recipient of both a TEXAS Grant and Exemption/Waiver, has a decreased amount in tuition and fees. Institutions are only required to cover, with matching funds, the balance of tuition and fees not covered by TEXAS Grant.

For example:

An institution would not be required to provide matching funds in excess of the TEXAS Grant award for a student who is exempt from the total cost of tuition and fees.

PRORATION ([19 TAC, SECTION 22.234](#))

Award amounts must be prorated under the following circumstances:

- Student is enrolled less than 3/4 time, but at least 1/2 time, with an approved hardship.

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

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

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

PROCESSING FUNDS

REQUESTING PROGRAM FUNDS

When requesting funds, eligible institutions must submit a Funds Request Form (FRF). The FRF is available through the secure Coordinating Board Pass System (CBPASS) portal on the [Student Financial Aid Programs Information Website](#).



NEW RULE

[19 TAC, Section 22.2](#)

TIMELY DISTRIBUTION OF FUNDS

- Institutions have **3** business days after receiving the funds to apply the funds to a recipient’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 their decision to cancel the award

RETURNING PROGRAM FUNDS

A **Return of Funds Form** must be submitted and approved, before any funds are returned to the THECB. This form is available on the [Student Financial Aid Programs Information Website](#).

AUTHORITY TO TRANSFER FUNDS ([19 TAC, SECTION 22.239](#))

Institutions participating in a combination of TEXAS Grant and Texas College Work-Study (TCWS) may transfer up to 10% of the institution’s total annual program allocation or \$20,000 (whichever is less) between programs in a given fiscal year. The transfer of funds must be encumbered by the institution by **February 20th**.

PROGRAM		RULE
FROM	TO	AUTHORITY TO TRANSFER
TEXAS Grant TEOG TEG	 TCWS	Institutions may transfer up to 10% or \$20,000 of the individual program annual allocation (whichever is less)
TCWS	 TEXAS Grant TEOG TEG	

OR

Funds can only be transferred from a grant to TCWS or vice versa, never from a grant to a grant.

APPENDIX 1: ADDITIONAL RESOURCES

CONTACT FINANCIAL AID SERVICES

By phone: (844) 792-2640

Contact us by completing an [online inquiry form](#) and use one of the following contact reasons below:

Contact Reason - Exemptions/Waiver Programs

- All state exemption and waiver programs including EAE

Contact Reason - Student Loan- School Info Request

- CAL
- BOT
- TASSP

Contact Reason - State and Federal Grants and Scholarships

- TEXAS Grant
- TEOG
- TEG
- Top 10%
- Bilingual Education Scholarship Program

Contact Reason - Work-Study Programs

- TCWS
- TCWS Mentorship

OTHER RESOURCES FOR INSTITUTIONS

General program information for institutions	Student Financial Aid Programs Information Website
General loan information	HHloans
Texas Program Statutes	Texas Education Code
Texas Program Rules	Texas Administrative Code
Information concerning programs, procedures, allocations, and other topics will be communicated to institutions through the GovDelivery system. To receive these communications, interested individuals must subscribe.	GovDelivery

AVAILABLE FORMS

TEXAS Grant, TEOG, TEG, TCWS	Authority to Transfer
This form must be used for the return of all state grant, scholarship, Educational Aide Exemption, and loan programs funds.	Return of Funds Form

CALENDAR

[Institutional Calendar](#)