

Financial Aid Advisory Committee Meeting Agenda

Name of Committee: Financial Aid Advisory Committee
Date of Meeting: Dec. 9, 2021
Time of Meeting: 9:00 a.m.
Location: Virtual Meeting

Agenda

1. Welcome, Introductions, and Overview of Meeting – Denise Welch, Chair
2. Consideration of Approval of Minutes from the meeting held on Sept. 2 – Denise Welch, Chair
3. Update: Prior FAAC Business – DeChà Reid, Senior Director, THECB-Financial Aid Services
4. Discussion: Financial Aid Strategy – Charles Conterò-Puls, Assistant Commissioner
5. Update: External Relations – John Wyatt, Senior Director, THECB-External Relations
6. Joint Update: House Bill 3 (FAFSA/TASFA Graduation Requirement); House Bill 2140 (Online TASFAA); and TASFAA Subcommittee – Claudette Jenks, Director, College Readiness and Success;
7. Update: Data Collection Subcommittee – Dede Gonzales, Subcommittee Chair
8. Update: Legislative Subcommittee – Arnold Trejo, Subcommittee Chair
9. Update: TASFAA Recommendations and Feedback – Robert Merino, TASFAA Representative
10. Update: School District Feedback – Ben Bholan, Arlington ISD; Shonna Norton, Wichita Falls ISD
11. Update: Office of Student Financial Aid Programs (SFAP) – DeChà Reid, Senior Director
12. Update: External Relations – John Wyatt, Senior Director, THECB-External Relations
13. Discussion: Proposed Amendments to TAC, Title 19, Part 1, Chapter 22, Subchapter A, Sections 22.1, 22.3, 22.6, and 22.11- DeChà Reid, Senior Director
14. Discussion: Election of Vice Chair– Denise Welch, Chair
15. Discussion: Selection of TASFA Subcommittee Chair- Denise Welch, Chair
16. Discussion: 2022 FAAC Meeting Dates– Denise Welch, Chair
17. Discussion: Feedback on the Department of Education Federal Student Aid Conference-Denise Welch, Chair
18. Discussion: Topics for Future Meetings – Denise Welch, Chair
19. Adjournment – Denise Welch, Chair

FINANCIAL AID ADVISORY COMMITTEE
Texas Higher Education Coordinating Board

COMMITTEE CHAIR	VICE CHAIR
<p>Denise Welch Financial Aid Director, Panola College Email: dwelch@panola.edu Term: 12/01/2018-10/31/2023 Denise has served as Director of Financial Aid at Panola College for more than ten years. Denise has been the Financial Aid Director at Panola College since 2008 and has more than 24 years of financial aid experience. Over the years she served as chair for the training committee and has been involved in training new aid officers on state and regionals levels. She has served on several committees in TASFAA, SWASFAA and NASFAA. She is a SWASFAA Past President with prior service as the Texas Delegate on the Board of Directors, also serving TASFAA Board of Directors as Vice President and Representative at Large. She has been active with NASFAA in several different task forces. She also served on the 2017-2018 NASFAA Board of Directors as the Regional Representative. She is currently serving as Representative at Large on the NASFAA Board of Directors. She is in her third year as a member of the FAAC for the Texas Higher Education Coordinating Board.</p>	<p>VACANT Pending Appointment of Vice</p>
PAST CHAIR	THECB REPRESENTATIVE
<p>Ed Kerestly Director of Financial Aid Angelo State University Term: 12/01/2018 – 10/31/2022 Ed Kerestly began working in financial aid in 1994. For the past three years, he has served as the Director of Financial Aid at Angelo State University (TX). He has also led financial aid offices at the University of Texas Permian Basin (TX), Abilene Christian University (TX), Grand Valley State University (MI), Calvin University (MI) and Cornerstone University (MI), as well as worked in the areas of admissions of student life at Greenville University (IL). Over the years, Ed has served in various leadership roles in state, regional, and national financial aid organizations. As the father of three college age children – all attending Angelo State University – he knows firsthand the challenge of paying for college, the importance of financial aid, and the commitment needed to assure kids get a great college education.</p>	<p>DeChá Reid Senior Director, Financial Aid Services Email: DeCha.Reid@highered.texas.gov DeChá Reid has been in the financial aid industry for 21 years and started with the Texas Higher Education Coordinating Board in 2015 as the Director of Financial Aid Services. Over the past 6 years, she has made huge strides to improve and streamline various processes surrounding state financial aid administration and was one of the driving forces behind the consolidation of the FA reports into the three cycle Financial Aid Database report and the Grant Payment system. Before THECB, DeChá worked both at a private and public institutions in Texas. She is known to her colleagues and peers as a reliable resource that is dedicated to the improvement of financial aid programs.</p>

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COMMITTEE MEMBERS

Adler, Jackie

Executive Director of Financial Aid
Email: Jackie.adler@tstc.edu

Term: 11/1/2021 – 7/31/2024

Ms. Adler has over 40 years of financial aid experience in the 2-year college sector. She spent 16 years and Hill College and has been at TSTC for 28 years. She has served as a TASFAA Board member, NASFAA trainer, and has been on TG’s Lender/School Advisory Board. As Executive Director of Financial Aid at Texas State Technical College, she oversees the financial aid operations of the college’s 11 locations and is responsible for the awarding of over \$60 million dollars of Federal, state and institutional funds. She works with a leadership team that strives to place more Texans and provides outreach and assistance to encourage enrollment and persistence. Her goal is to improve the financial application process for students and to provide excellent customer service.

Bholan, Dr. Ben

Principal – Arlington ISD
Email: BBholan1@aisd.net

Term: 11/01/2019 – 10/31/2022

Dr. Bholan has been an educator for over 24 years, having a reputation as a leader who improves students’ outcomes. He served as the founding principal of our district's first early college high school, Arlington Collegiate High School in which nearly 90% of the first graduating class earned their associate degree. He now serves as the founding principal of our second early college high school, Arlington College and Career High School. Dr. Bholan is very interested in finding ways to improve the overall financial aid informational processes for parents and students, setting goals and professional development experiences for himself aligned with this area of need.

Chen, Victoria

Director of Scholarships and Student Financial Aid – Texas Christian University
Email: V.Chen@tcu.edu

Term: 11/01/2020 – 10/31/2023

Dr. Chen has many years of experience as an aid administrator, at both public and private universities. She has extensive experience in managing state aid programs. During her career she has managed all state grant programs for TCU and served as loan coordinator for the College Access Loan.

Garrett, Rachele

Director of Financial Aid
Stephen F. Austin University
Email: Nixonhr@sfasu.edu

Term: 12/01/2018-10/31/2022

In Ms. Garrett’s role as Financial Aid Director and with the help of those in her division, she has worked tirelessly to lower student debt. By staying in touch with several state entities, Rachele has also initiated steps to help reduce SFAs parent loan debt amounts. Her knowledge of the financial aid process has also been instrumental in helping to secure needed financial aid for students who enroll in SFAs summer bridge program. Rachele's leadership efforts have also resulted in her department being available for presentations during campus orientations. She also is part of the SFA Road Show that travels to various off-campus events detailing the importance of completing FASFA applications, adhering to timelines, and providing various pathways to assist students on how to best use their financial aid awards.

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Gonzales, Dede

Associate Director, Financial Aid and Scholarships
Texas State University, San Marcos, Texas
Email: dedegonzales@txstate.edu

Term: 12/01/2020-10/31/2023

Ms. Gonzales has over 20 years of experience and expertise in financial aid administration, as well as knowledge of the four-year public university sector. Her experience in the administration of federal, state, and institutional financial aid programs as well as broad experience in student customer service, financial literacy and regulatory compliance operations makes her an ideal addition to the FAAC.

Ingram, Bridgette

Director, Student Financial Assistance
Texas A&M University, College Station, Texas
Email: BIngram99@tamu.edu

Term: 12/01/2020-10/31/2023

Ms. Ingram has served in the financial aid industry for over 20 years, she has been with the financial aid office at Texas A&M for just over 16 years, prior to her service at Texas A&M she was a member of Blinn College financial aid team. Bridgette has served the Texas Association of Student Financial Aid Administrators (TASF AA) as Chair of the Scholarship Committee and member of the fall conference committee; she also served the Southwest Association of Student Financial Aid Administrators (SWASF AA) as chair of the membership committee. In addition, she has also served on a couple of task force for the Texas Veterans Commission as well. Bridgette has presented at state and national conference on financial aid and veterans benefit programs.

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<p>Jones, Cecelia Director of Financial Aid Jarvis Christian College Email: ckjones@jarvis.edu Term: 11/1/2020 – 7/31/2023 Cecelia Jones is currently the Director of Financial Aid at Jarvis Christian College. She has nearly 30 years of experience as a financial aid administrator and has worked with financial aid professionals while serving in state, regional, and national associations. Cecelia has served on TASFAA's Board of Directors as a member-at-large and several TASFAA committees. Additionally, she presently serves as a member of the ICUT E-Committee. Cecelia earned her Bachelor's Degree from Wiley College and her Master of Education degree from Abilene Christian University.</p>	<p>Leafgreen, Melet Director of Financial Aid UT Southwestern Medical Center Email: Melet.Leafgreen@UTSouthwestern.edu Term: 11/1/2021 – 7/31/2024 Melet Leafgreen has worked in Financial Aid for 21 years. The first 16 years she held various positions at TCU in Fort Worth, then moved to UT Arlington. Since 2017 she has been the Director of Student Financial Aid at UT Southwestern Medical Center in Dallas. She has served TASFAA as Board Member, Committee Chair, and as TASFAA President. She currently serves as a NASFAA Credential test content editor. She has three dogs, one husband, and one fantastic 7 year old son.</p>
<p>Nolan, Holly Executive Director of Financial Aid University of Houston – Clear Lake Email: Nolan@UHCL.edu Term: 11/01/2020-10/31/2023 Ms. Nolan is extremely knowledgeable about financial aid opportunities for Texas students, and most importantly the eligibility and processes for applying for financial aid. Finally, Ms. Nolan has provided key insights and leadership while working effectively to utilize federal and state funding provided to students as we navigate the COVID-19 pandemic.</p>	<p>Norton, Shonna Director of Social & Emotional Services Wichita Falls ISD Email: snorton@wfisd.net Term: 03/01/2020-10/31/2023 In her role with WFISD, Mrs. Norton has streamlined and organized the district's process of informing parents and students about their college and career options, including financial aid. She plans and organizes District events for college readiness, financial aid, dual credit, college application, and FAFSA completion to ensure all families are receiving the same information and level of service. Her previous work experience in academic guidance, college and career advising, campus administration, and district administration gives her a unique perspective on helping students and parents receive the information and services they need.</p>

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<p>Peterson, Steven Director of Financial Aid and Scholarships Blinn College Email: steven.peterson@blinn.edu Term: 11/01/2020-10/31/2023 Mr. Peterson has over 28 years working in financial aid and holding various positions at St. Edwards University where he gained experience working with Ellucian Banner and ARGOS. He has extensive experience in writing ARGOS reports for reporting and processing needs and ensuring the data he is pulling is accurate. His most recent experience has been at Blinn College on the Brenham campus. Mr. Peterson understands the short and long term impacts of regulations and financial aid.</p>	<p>Ramirez, Sal College and Career Readiness Coordinator El Paso ISD Email: sramirez@episd.org Term: 7/1/2021 – 7/30/2021 Mr. Ramirez, with over 15 years of experience in education, has worked for the last five years as representative/campus coordinator of the College and Career Readiness Department with the El Paso Independent School District. Working with faculty, administration, parents and students, Mr. Ramirez has guided families and students in choosing options that are financially and educationally best suited for their circumstances. Mr. Ramirez has been working in partnership with the College Access New Tech Network grant program for the previous two years. Through this grant partnership with NTN, Mr. Ramirez has been able to focus on successful financial aid planning targeting minority groups that have difficulty accessing resources to financial aid, scholarships, and grants. As the College and Career Readiness Coordinator at an early college high school, Mr. Ramirez has been able to implement initiatives and programs that have streamlined the financial aid process to make the challenges of applying less of a burden for students and families.</p>
<p>Ratliff, Thomas Director of Student Financial Services Abilene Christian University Email: thomas.ratliff@acu.edu Term: 11/01/2019-10/31/2022 New to Texas, Mr. Ratliff came to Abilene Christian University with 30 years of Financial Aid administration experience from proprietary, public and private universities. Before coming to Texas, Thomas served for 13 years on the Indiana Student Financial Aid Administrators Governmental Relations Committee contributing to student aid policy discussions for the Indiana Commission for Higher Education.</p>	<p>Ruiz, Joseph Director of Financial Aid Services Del Mar College Email: jruiz.156@delmar.edu Term: 11/1/2021 – 7/31/2021 Mr. Ruiz was born and raised in Kingsville, Texas. He earned a Bachelor's of Arts Degree in Political Science and Spanish at Texas A&M University Kingsville. He also earned a Master's of Science degree in Education Administration at Texas A&M University-Corpus Christi. Joseph began his career working for various non-profit organizations. Joseph went on to work for Texas A&M University-Corpus Christi in the Office of Student Financial Aid where he held titles of Financial Aid Outreach Advisor, Assistant Director, and Associate Director. He worked on that campus for 12 years where he provided countless hours of presentations for students, parents, high school counselors, staff, and faculty regarding financial literacy, entrance and exit loan counseling, and completing the FAFSA process. He also has presented at many professional associations presented at NASFAA, TASFAA, College Board, AACRO, TAACRO, FSA, and Riverside HS Counselor Network.</p>

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<p>Sides, Tevian Director of Financial Aid Western Texas College Email: tevian.sides@wtc.edu Term: 11/2/2020 – 10/31/2023 Tevian Sides has been the Director of Financial Aid a Western Texas College for only 2 ½ years. Tevian received a Bachelor’s of Business Administration from Tarleton State University in 1995. Prior to becoming a member of the financial aid community, Tevian was a project Assistant for an architectural firm as well as worked at a Bank and an Auditor. Tevian enjoys being able to assist low-income families with their educational journey especially with providing financial assistance. “I have enjoyed this position more than I eve thought I would. It is such a great feeling to help students pursue their dreams. I have done several jobs in my life but this one is by far the most rewarding. I just hope to be able to help out our students even more by serving on this committee.”</p>	<p>Thomas, Dr. Joy Associate Director of Financial Aid Prairie View A&M University Email: jdthomas@pvamu.edu Term: 11/01/2019-10/31/2022 Dr. Thomas is interested in improving operational processes by utilizing technology and the use of unconventional resources to improve the efficiency of the financial aid process. Through the leadership of Dr. Thomas, Prairie View was able to commence the financial aid 2019-2020 awarding/packaging process earlier for both incoming and returning students. Dr. Thomas is involved in activities related to improving the overall student experience. Dr. Thomas volunteers her time to work with student associations to provide guidance and support to facilitate open communication with various constituents at Prairie View A&M University.</p>
<p>Trejo, Arnold Executive Director of Financial Aid and Scholarships University of Texas at San Antonio Email: arnold.trejo@utsa.edu Term: 11/01/2020-10/31/2023 With over 30 years in the profession, Mr. Trejo has worked in various leadership positions supporting student access and success, advocating for meaning financial aid policies and practices that fuel positive changes within the profession. Mr. Trejo has worked at a flagship, several mid-sized HSI campuses, and has had several business ventures - all of which have given him the breadth and depth of experience necessary to successfully lead dynamic teams focused on securing financial resources for student success.</p>	<p>Zavala, Gilbert Vice President, Education and Talent Development Austin Chamber of Commerce Email: gzavala@austinchamber.com Term: 11/1/2021 – 7/30/2024 As Vice President of Education & Talent Development at the Austin Chamber, Gilbert Zavala oversees our school district and higher education partnerships to execute the Chamber’s education/talent strategies and has a strong focus on financial aid completion and financial aid policy at both the state and federal level. Gilbert leads efforts to ensure high school graduates in Austin MSA connect to finding for college through our annual FAFSA/Financial Aid Saturdays Campaign, engaging 300-400 volunteers from our business community, schools, colleges, and college access groups to help families complete FAFSA/TASFA forms in advance of the Texas priority aid deadline. Gilbert has also represented the Chamber on multiple state and national boards aligned with education/talent priorities. The U.S. Chamber of Commerce and the National Association of Chamber of Commerce Executives have both recognized and awarded Gilbert multiple fellowships based on this work to improve FAFSA completion and talent development/educational attainment for the region.</p>

STUDENT REPRESENTATIVE

FINANCIAL AID ADVISORY COMMITTEE
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Jase Kugiya

University of Texas at Austin

Email: jasekugiya@utexas.edu

Term: 06/01/2020 – 05/31/2022

Jase Kugiya was born and raised in Hawaii but has since experienced living in several states as well as extensive educational experience at several institutions during his postsecondary education. Mr. Kugiya is currently pursuing his Doctorate of Philosophy in Higher Educational Leadership at the University of Texas at Austin after receiving his Masters of Social Work from the University of Michigan at Ann Arbor. Mr. Kugiya received a Bachelor of Social Work with a minor in Sociology from Saint Martin's University in Lacey, WA.

Mr. Kugiya is interested in researching the issues driving the increasing costs of higher education and whether the return on investment for students is justifiable. In his own words "this topic is especially pertinent as we get closer to 2030. In a sense, the goals and outcomes of *60x30TX* are contingent on the accessibility and value of pursuing a postsecondary degree or credential for Texans."

Financial Aid Advisory Committee
Meeting Notes
Sept. 2, 2021
(To be approved at the December 9, 2021, FAAC Meeting)

Committee Members in Attendance Via <u>Virtual</u> Meeting Connection		Committee Members Absent
Ed Kerestly (Chair) Denise Welch (Vice Chair) Robert Merino (Past Chair) DeChá Reid (THECB Representative) Taryn Anderson Dr. Ben Bholan Johanna Boley Victoria Chen Rachele Garrett Dede Gonzales Heidi Granger Bridgette Ingram	Tam Nguyen Holly Nolan Shonna Norton Steven Peterson Kelly Steelman Joy Thomas Arnold Trejo Jase Kugiyi (Student Rep)	Thomas Ratcliff Dr. Formon Thompson
Agenda Item 1. Welcome, Introductions and Overview of Meeting		Ed Kerestly, Chair
Handout Provided: No		Formal Decision/Action Required N/A
Presentation Summary:		
<ul style="list-style-type: none"> Due to nature of virtual meetings, roll call of members ensured a quorum of committee members. 		
Agenda Item 2. Consideration of Approval of Minutes from the meeting held on June 3, 2021		Ed Kerestly
Handout Provided: Yes		Formal Decision/Action Required Minutes approved
Presentation Summary:		
<ul style="list-style-type: none"> No corrections were identified. 		
Agenda Item 3. Update: Prior FAAC Business		DeChá Reid Senior Director
Handout Provided: No		Formal Decision/Action Required N/A
Update Summary:		
<ul style="list-style-type: none"> Update on Prior Business is: FAAC rules that were proposed in the Texas Register on May 14 received no comments and were approved by the Board on July 22. The proposed rules will go into effect on September 10. In addition to extending the FAAC for another four-year period (new abolishment date is October 31, 2025), the rules implement the recommendations of the FAAC: Changes the start of the committee members terms to the first meeting of the state fiscal year (e.g., the September meeting) Reduces the number of student representatives from two to one. Adds a representative from the non-profit sector with responsibility for advising students regarding financial aid Recommended slate of nominations for Board approval: 		
Recommended new Financial Aid Advisory Committee member:		
Jackie Adler Executive Director of Financial Aid Texas State Technical College (Term ending 2024)		
Cecelia Jones Director of Financial Aid Jarvis Christian College (Term ending 2024)		
Melet Leafgreen Director of Financial Aid University of Texas- Southwestern Medical Center (Term ending 2024)		
Sal Ramirez College and Career Readiness Coordinator El Paso ISD/Transmountain Early College High School (Term ending 2024)		
Joseph Ruiz Director of Financial Aid Del Mar College (Term ending 2023, to serve the remainder of unexpired term due to Johanna Boley retiring.)		

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(To be approved at the December 9, 2021, FAAC Meeting)

<p>Tevian Sides Director of Financial Aid Western Texas College (Term ending 2024)</p> <p>Gilbert Zavala Vice President Austin Chamber of Commerce (Term ending 2024)</p> <p>Robert Merino President-Elect TASFAA (Nominated for a one-year term as the TASFAA representative.)</p>	
Agenda Item 4. Presentation: "Hidden Bias of in Professional Judgement"	Presenters, Daniel Barkowitz and Michael Birchett
Handout Provided: Yes	Formal Decision/Action Required N/A
<p>Update Summary:</p> <ul style="list-style-type: none"> • Presentation on how FAA's approach professional judgment. <p style="text-align: center;">**See handout for agenda item 4 for more information.</p>	
Agenda Item 5. Presentation: TEXAS Grant Annual Report	Andrea "Andy" Thomas, SFAP Asst. Dir. Date Management and Analysis
Handout Provided: Yes	Formal Decision/Action Required N/A
<p>Update Summary:</p> <ul style="list-style-type: none"> • Presentation on report that will go to the Board for approval. • Follow-up questions from the Committee: <ul style="list-style-type: none"> ○ What is the unmet need for the programs? ○ Look at the recommended dollar amount for TEXAS Grant <p style="text-align: center;">**See handout for agenda item 5 for more information.</p>	
Agenda Item 6. Update: External Relations	John Wyatt
Handout Provided: No	Formal Decision/Action Required N/A
<p>Update Summary:</p> <p>Additional \$94.6 million of GEER funds distributed to the agency. Listed the breakdown and divisions that were administering the funds:</p> <ul style="list-style-type: none"> • Institutional Capacity Grants will be handled by Workforce Education Division and will be available to public institutions to complete a Request For Information. • Texas Reskilling Support Fun Grant 2.0 will be handled by Workforce Education Division and will be available to public institutions to complete a Request For Information (RFI). More information will be provided when these funds are available to request. • Financial Aid Pilot Programs <ul style="list-style-type: none"> ○ Texas Leadership Scholars Program will be handled by our Academic and Health Affairs Division. More information will be provided when these funds are available to request. ○ Texas Transfer Grants will be handled by the Student Financial Aid Programs and will be available to public institutions. More information will be provided when these funds are available to request. • Student Success & Equity Initiatives will be handled by College, Readiness and Success Division. These funds are earmarked for the agency to continue to provide resources and tools for students. • Student Engagement and Educator Training will be handled by College, Readiness and Success Division. These funds are earmarked for the agency to continue to provide resources and tools for students. • GRADTX 2.0 Expansion will be handled by College, Readiness and Success Division. These funds are earmarked for the agency to continue to provide resources and tools for students. • DATA SECURITY AND ACCESSIBILITY will be handled by THECB's Information Support and Services Division. These funds are earmarked for the agency to continue our efforts with modernizing our data infrastructure. 	

Agenda Item 7. Joint Update: House Bill 3 (FAFSA/TASFA Graduation Requirement); House Bill 2140 (On-line TASFAA)	Claudette Jenks Director, College Readiness and Success and Robert Merino, Subcommittee Chair
Handout Provided: Yes	Formal Decision/Action Required N/A
Update Summary: <ul style="list-style-type: none"> • 2022-23 TASFA <ul style="list-style-type: none"> ○ The preliminary form was sent to all the directors on Sept. 1, 2021 for institutional use only ○ The form will not be release until Oct. 1, 2021 to students in the event modifications may be needed. ○ Minor changes to the form: <ul style="list-style-type: none"> ▪ Annual updates to years and dates ▪ Annual updates to tax and income Internal Revenue Service (IRS) references ▪ Selective Service Updates: <ul style="list-style-type: none"> • Adding option for females and select "N/A" • Updating banner color for visibility • House Bill 3 FAFSA/TASFA Graduation Requirements <ul style="list-style-type: none"> ○ The 86th Texas Legislature passed HB 3 into law under Texas Education Code 28.0256. ○ Texas Education Agency rule §74.1023; reflects the requirements in HB 3, that each student complete and submit a FAFSA or TASFA before graduating from high school. ○ Beginning with students enrolled in the 12th grade during the 2021-22 school year, each student must complete and submit a FAFSA/TASFA or a signed opt-out form. ○ Institutions should anticipate receiving an increase in FAFSA/TASFFA submissions starting Oct. 1, 2021. ○ High school students submitting a paper TASFA may contact the institution requesting proof of submission. ○ Consider FERPA restrictions • House Bill 2140 <ul style="list-style-type: none"> ○ House Bill passed into law under Texas Education Code, 61.07762, which established: <ul style="list-style-type: none"> ▪ TASFA to be electronic and linked through the ApplyTexas system ▪ Advisory committee of stakeholders to make recommendations on functionality, cost and other considerations. • HB 3273 and SB 1860 <ul style="list-style-type: none"> ○ HB 3273 by Neave and SB 1860 by Powell extended the implementation of electronic TASFA from 2022-23 to 2023-24 academic year to align with the recently adopted federal FAFSA simplification changes. • Online TASFA Development Goals <ul style="list-style-type: none"> ○ Provide the necessary data so school can calculate an EFC* ○ Reduce application time to improve efficiency for the students by building in skip logic ○ Support students through ability to send TASFA to multiple schools at once ○ Align with FAFSA questions and format where applicable for ease use • Online TASFA Stakeholders in Development <ul style="list-style-type: none"> ○ Institutions of Higher Education ○ School Districts (Counselor Suite) ○ ApplyTexas – Contractor (UT Austin) ○ Texas Education Agency (TEA) ○ Community-Based Organizations ○ Vendors of Financial Aid Management Software Systems • Online TASFA Progress <ul style="list-style-type: none"> ○ Development and programming are underway ○ Online TASFA is being incorporated into ApplyTexas Counselor Suite ○ Progress has been made on how files will be sent into institutions ○ Ongoing vendor discussions ○ TASFA Advisory Committee merged with FAAC TASFA to create adhoc work groups to continue guiding content, technical development, and testing ○ Establishing rules to administer the online TASFA ○ 2023-24 is expected on Oct. 1, 2022 	
Agenda Item 8. Update: Data Collection Subcommittee	Dede Gonzales, Subcommittee Chair
Handout Provided: Yes	Formal Decision/Action Required N/A

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Update Summary:	
The Data Collection Subcommittee met in July 2021 and provided the following updates.	
<ul style="list-style-type: none"> • PPA Agreements. <ul style="list-style-type: none"> ○ PPA can be signed by any authorized person from the institution. THECB will defer to the institution for this decision • FAD Modernization Project <ul style="list-style-type: none"> ○ First Phase is to have the FAD input files put into the cloud environment. Scheduled to release at the end of October 2021 • Updates on two statutes: <ul style="list-style-type: none"> ○ Drug Conviction for State Aid ○ Financial Aid and Child Support 	
**See handout for agenda item 8 for more information.	
Agenda Item 9. Update: Legislative Subcommittee	Arnold Trejo, Subcommittee Chair
Handout Provided: No	Formal Decision/Action Required N/A
Update Summary:	
<ul style="list-style-type: none"> • Discussion with TASFAA Board to collaborate with Legislative issues. Have a representative of the FAAC committee on TASFAA to bring information for the FAAC meetings. 	
Agenda Item 10. Update: TASFAA Recommendations and Feedback	Taryn Anderson, TASFAA
Handout Provided: No	Formal Decision/Action Required N/A
Update Summary:	
Updates to the recommendations from the previous FAAC meeting held on June 3, 2021	
<ul style="list-style-type: none"> • TASFFA provided COVID-19 resources and created a forum within their website pertaining to COVID-19. Any member of TASFAA can access the forms on the website. • TASFFA Conference Update: There will be COVID-19 Emergency related sessions provided. • Robert Merino will be TASFFA President beginning Nov. 1, 2021 	
Agenda Item 11. Update: School District Recommendations and Feedback	Ben Bholan, Arlington ISD and Shonna Norton, Wichita Falls ISD
Handout Provided: No	Formal Decision/Action Required N/A
Update Summary:	
<ul style="list-style-type: none"> • No recommendations or feedback. Questions and concerns were answered in the previous agenda items. 	
Agenda Item 12. Discussion: Program Participation Agreement	DeChà Reid, Senior Director
Handout Provided: No	Formal Decision/Action Required N/A
Discussion Summary:	
<ul style="list-style-type: none"> • All PPA's have been received from the institutions. • The PPA fields on the form need further clarification and the instructions. • The PPA will expire Aug. 2023 and changes to some of the items will be addressed on the next PPA cycle. 	

Agenda Item 13. Discussion: Verification and Controlled Substance for State Financial Aid Program	DeChà Reid, Senior Director
Handout Provided: No	Formal Decision/Action Required N/A
Update Summary: <ul style="list-style-type: none"> • Selective Service and Controlled Substance State Requirements <ul style="list-style-type: none"> ○ On June 11, 2021 the Department of Education released a Dear Colleague Letter (DCL ID: GEN-21-04) addressing early implementation of two of the FAFSA Simplification Act's eligibility requirements removals: Selective Service and Drug Conviction. ○ In the most recent 87th Texas Legislative session, no changes were made to remove or modify the Selective Service Status requirement under Texas Education Code (TEC), Section 51.9095 or the conviction of a felony or an offense of a controlled substance requirement included in the Toward EXcellence, Access, and Success (TEXAS) Grant)TEC, 56.304(b) and 56.305(b) and the Texas Educational Opportunity Grant (TEOG) (TEC), 56.404(b) and 56.405(b) programs and thus these two requirements to receive state financial aid remain in effect. ○ SFAP is currently reviewing the related requirements in the Texas Administrative Code. Institutions should continue to use current practices to meet state financial aid requirements until further guidance is provided. Looking to provide the guidance this month on how the state financial aid process is impacted. • Verification Changes for 2021-22 <ul style="list-style-type: none"> ○ On July 13, 2021 the Department of Education released a Dear Colleague Letter (CDL ID: Gen-21-05) which announced changes to 2021-22 Verification Requirements. These changes were made to provide relief to students and institutions who have faced various challenges as a result of the ongoing national emergency. ○ Institutions may choose to apply for this federal guidance to the state financial aid programs if a valid estimated family contribution (EFC) can be confirmed for calculating financial need for state awarding purposes. ○ For TASFA students, institutions have discretion to select students for verification according to consistently applied institutional policies. If a process is in place to calculate a valid EFC without verifying, institutions may continue to use that process. 	
Agenda Item 14. Discussion: FAFSA Simplification: Student Aid Index	Denise Welch, Chair
Handout Provided: No	Formal Decision/Action Required N/A
Presentation Summary: Input from Committee members on Student Aid Index Concerns: <ul style="list-style-type: none"> ○ Will this make a drastic difference to Pell eligible students? ○ Families will have to report the net value of any business or farm they own if they didn't qualify for the simplified formula 	
Agenda Item 15. Discussion: FAAC Contributions	Ed Kerestly, Chair
Handout Provided: No	Formal Decision/Action Required N/A
Presentation Summary: FAAC supports the extension of abolishment date and modification to rules that help support the FAAC. This allows recommendations to be included in the annual report. (every four years, next discussion to occur 2024).	
Agenda Item 16 Update: Office of Student Financial Aid Programs	DeChà Reid, Senior Director
Handout Provided: No	Formal Decision/Action Required N/A
Presentation Summary: <ul style="list-style-type: none"> • SFAP Accomplishments since the last FAAC meeting <ul style="list-style-type: none"> ○ A new repayment option for CAL loans became effective July 1. The Low Payment Forbearance plan allows for payments to be temporarily reduced for up to six months due to temporary financial hardship. The reduced payment is based on the borrower's standard monthly payment amount and cannot be less than half of the 	

- standard payment amount or the amount of monthly interest accrual. Major benefit of this plan is that use of the repayment option does not count against a borrower's maximum repayment term.
- Interest rate changes for federal loans and CAL variable rate loans went into effect July 1, with solicitation close date of August 26. Submitted bids will be evaluated during the month of September.
 - Released all FY 2022 program allocations
 - Published FY 2022 Education Aide Exemption (EAE) Program application, FAQs, and Funds Request Form
 - Published FY 2022 Bilingual Education Program guidelines and Funds Request Form
 - Update TEG Program Guidelines with new tuition differential totals for FY 2022
 - Released the Comprehensive Program Guidelines
 - Transitioned schools from MOU to PPA
 - **Deadline Extended: Texas Armed Services Scholarship Program**
 - The Texas Higher Education Coordinating Board has extended the deadline for legislators to submit nominations to September 30, 2021. As a result of this extension, the deadline for the institutions financial aid office to complete a TASSP application for nominated recipients has also been extended to November 5, 2021.
 - **Funds Request Process**
 - **Grant Programs**
 - Institutions can begin submitting funds request for FY 2022 for the three state grant programs which include Toward Excellence, Access and Success (TEXAS) Grant, Texas Educational Opportunity Grant (TEOG) and Tuition Equalization Grant (TEG). The additional funding (Strategy B.1.10) that was communicated in the final allocations for each program are being added in the grant payment portal in the coming months to reflect the full allocation amount
 - **Special Programs**
 - Institutions can begin submitting funds request for FY 2022 for the Educational Aide Exemption (EAE) and the Bilingual Education Program by submitting the applicable PDF fillable form available on the Student Financial Aid Programs webpage under [Program Resources](#).
 - **Work-Study Programs**
 - Institutions participating in Texas College Work-Study (TCWS) or Work-Study Student Mentorship Program (WSMP) will receive FY 2022 funds as a lump-sum payment. **Note:** all requests and payments will be processed by Financial Aid Services after the first day of the new fiscal year, **Sept. 1, 2021**.
 - **College Access Loan (CAL) and Texas Armed Services Scholarship Program (TASSP) Processing**
 - Starting September 2021, all CAL applications that re "incomplete" after 60 days in the HelmNet portal will be deactivated. This process will ensure that the HelNet system is current with applications that are moving through the funding process.
 - All FY 2022 TASSP disbursements will be processed by the THECB after the first day of the new fiscal year, Sept. 1, 2021.
 - **Institutional Calendar**
 - The Fall 2021 Calendar edition (Sept. – Dec. 2021) is now available on the SFAP webpage under Stay Connected → Calendar of Program Deadlines
 - **HHloans Online Fillable Forms**
 - In an effort to streamline and modernize the borrower experience, various forms on the hhloans.com website were updated to be fillable and include the option to electronically sign before submitting them to the THECB. The following fillable forms are now available.
 - Borrower Repayment Options Form
 - General Postponement Request Form
 - TASSP Annual Certification Form
 - BOT loan Application for Forgiveness
 - Authorization for Release of Information Form
 - **Exemption and Waiver Program Guidelines**
 - The following resources were published for institutions to reference on the Student Financial Aid Programs webpage under the Exemptions and Waivers webpage for the two exemption and waiver programs listed below.
 - Children of Professional Nursing Program Faculty and Staff – Fact Sheet
 - Competitive Scholarship Waiver – Fact Sheet
 - **2022-23 Texas Application for State Financial Aid (TASFA) – Institutional Use Only**
 - The 2022-23 Texas Application for State Financial Aid (TASFA) is enclosed for institutional use only. While changes are not anticipated on this current version, institutions should avoid releasing to students in the event modifications are needed prior to the official publication on Oct. 1, 2021.
 - As a reminder, this early release gives institutions time to:
 - Customize the TASFA and prepare for posting online for the Oct. 1 release to students
 - Provide the TASFA to vendors for software updates
 - The following minor changes were made to the 2022-23 TASFA based on recommendations by the Financial Aid Advisory Committee's TASFA Subcommittee and the Texas Higher Education Coordinating Board (THECB):
 - Annual updates to years and dates
 - Annual updates to tax and income Internal Revenue Service (IRS) references
 - Selective Service Updates:
 - Adding option for females to select "N/A"
 - Updating banner color for visibility

Financial Aid Advisory Committee
Meeting Notes
Sept. 2, 2021
(To be approved at the December 9, 2021, FAAC Meeting)

<ul style="list-style-type: none"> ○ The THECB will not post the English and Spanish TASFA online for students until Oct. 1, 2021. At that time, both language versions will be available to students and their families on the College for All Texas and the Student Financial Aid Programs webpages. 	
Agenda Item 17 Update: Recognition of members stepping down	Ed Kerestly, Chair
Handout Provided: No	Formal Decision/Action Required N/A
Presentation Summary: <ul style="list-style-type: none"> • Chair stated four members whose term will end and recognition of their contribution to the FAAC: <ul style="list-style-type: none"> ○ Kelly Steelman ○ Tam Nguyen ○ Heidi Granger ○ Taryn Anderson 	
Agenda Item 18. Transition of Leadership	Ed Kerestly, Chair
Handout Provided: No	Formal Decision/Action Required N/A
<ul style="list-style-type: none"> • Current Chair passed the “torch” over to new Chair: Denise Welch and offered some guidance on how to be successful in the role. 	
Agenda Item 19. Discussion: Topics for Future Meetings	Denise Welch, Chair
Handout Provided: No	Formal Decision/Action Required N/A
<ul style="list-style-type: none"> • No items identified 	
Agenda Item 20. Adjournment	Denise Welch, Chair
Handout Provided: No	Formal Decision/Action Required N/A
<ul style="list-style-type: none"> • Adjourned at 12:39pm (CST) 	

AGENDA

FAAC Data Collection Sub-Committee Meeting

Nov. 10, 2021: 9:30–11:30am

	<p>Update on Online TASFA</p> <p>This topic will provide an update on the progress of the online TASFA.</p> <p>Update:</p> <ul style="list-style-type: none">• Online TASFA is still in the development phase and will be ready to launch by Oct. 1, 2022.• There is a recorded video from the Oct. 19, 2021 webcast that provides a demo of the online TASFA.• The file layout is still being decided on; options are CVS, PDF, or API file transmission.• Looking into developing an Application Programming Interface (API) layout which is a more modernized layout to transmit data; the agency is moving in this direction for file transmission.• Working closely with vendors, which have informed THECB that to have a file layout within the schools FAMS, will take longer for a vendor to map-out. Anywhere between 12-18 months.• Within the next couple of months, THECB will work with schools on the testing of the file layout; THECB is planning on doing testing first.• Training will be provided by THECB staff once all testing is complete.• Administrative rules are being drafted to reflect that it is a requirement to accept the data from the online TASFA; a student does have a choice to complete the online TASFA or paper. <p>Action Item: Send out the file layout to the committee</p>	Virtual Meeting- Leah Smalley
	<p>Update on FAD Data Modernization</p> <p>This topic will provide a quick update on the progress made on the modernization project.</p> <p>Update: (show FAD slide from the TASFAA Conference)</p> <ul style="list-style-type: none">• There are 5 distinct projects that comprise of the overall FAD Modernization project<ul style="list-style-type: none">◦ The Admin portal◦ Validation of Data◦ Protecting PII◦ The THECB (Internal) portal	Virtual Meeting- DeCha Reid

	<ul style="list-style-type: none"> ○ Submission process • All five projects are in the development phase. There are two that are in the QA phase. • The major component of the project is the submission process. This process is schedule for testing in Jan-Feb'2022. • The idea is to have the Data Collection Sub-committee test the submission process from start to finish, using the FY22 data. • The goal is to go live with the new submission process for all schools during the summer of 2022. • Training will be provided along with an updated instruction manual. <p>Comment:</p> <p>Appreciate the work that is being done.</p>	
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	<p>Discussion Topic: FY2022 and FY2023 FAD Instruction Manual</p> <p>This topic will discuss the deadline dates for FY2022 and any changes to the content in the instruction manual, along with changes to FY2023 FAD.</p> <p>FY2022 Proposed FAD Dates:</p> <table border="1" data-bbox="305 1050 1286 1333"> <thead> <tr> <th>Reporting Cycle</th> <th>First Day to Submit</th> <th>Deadline</th> <th>Submission Requirements</th> </tr> </thead> <tbody> <tr> <td>First</td> <td>February 23, 2022</td> <td>April 11, 2022</td> <td>Deadline to validate student data.</td> </tr> <tr> <td>Second</td> <td>June 15, 2022</td> <td>Aug. 22, 2022</td> <td>Deadline to validate student data.</td> </tr> <tr> <td>Third</td> <td>Sept. 28, 2022</td> <td>Dec. 5, 2022 or *Nov. 14, 2022</td> <td>Deadline to reconcile state program totals and certify student data.</td> </tr> </tbody> </table> <ul style="list-style-type: none"> • The idea is to change in the last submission deadline date • Is there anything that would truly prevent a November 15 deadline for Cycle 3. (The FISAP is due by October 1.) The FAD certifications extending into January cause numerous data analysis delays, and as an agency we are not sure what other solution exists other than simply moving the deadline earlier. <p>Comments:</p> <ul style="list-style-type: none"> • Will IFRS being compared to FAD exemptions and waivers (Texas Tomorrow funds) be an issue with comparison the funds? • Could there be a consideration for FY22 for the first week of Dec. 1 to see how the FAD modernization will eliminate the processing time. • HEERF reporting for the state of Texas for Nov. 15 • Busy time since most schools are preparing for the next academic year and term 	Reporting Cycle	First Day to Submit	Deadline	Submission Requirements	First	February 23, 2022	April 11, 2022	Deadline to validate student data.	Second	June 15, 2022	Aug. 22, 2022	Deadline to validate student data.	Third	Sept. 28, 2022	Dec. 5, 2022 or *Nov. 14, 2022	Deadline to reconcile state program totals and certify student data.	<p>Virtual Meeting- DeCha R.</p>
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- A lot of resources for different reporting in this time frame
- Recommend a date of Dec. 5 for FY2022 as a start of changing the timeline then November deadline for FY2023.

Support recommendation to help schools:

- Changing the file layout would make it easier to submit the information on time.
- Additional training to schools
- Partnering schools with other schools to share best practices
- Detailed documentation sharing that ahead of time

FY2023 Proposed FAD Dates:

Reporting Cycle	First Day to Submit	Deadline	Submission Requirements
First	February 15, 2023	April 10, 2023	Deadline to validate student data.
Second	June 14, 2023	Aug. 21, 2023	Deadline to validate student data.
Third	Sept. 27, 2023	*Nov. 13, 2023	Deadline to reconcile state program totals and certify student data.

- Additional data elements will be programmed for FY2023
 - Data element for Texas First Scholarship dollar amount
 - Data element for Bilingual Education dollar amount
 - Data element for Educational Aide Exemption (EAE) dollar amount
 - Data element for EAE matching requirement

Discussion Topic: 2022 Data Collection Sub-Committee Meeting Dates

This topic will discuss the committee dates for the 2022 calendar year.

Committee selection of dates for 2022:

- February 24, 2022
- April 28, 2022
- July 28, 2022
- November 17, 2022

The time for the meeting will remain from 9:30-11:30am

Virtual Meeting-
Dede G.

Discussion Topic: SFAP Updates

This topic will discuss any updates within the Student Financial Aid Programs (SFAP) division.

General Agency Updates

Virtual Meeting-
DeCha R.

Announcement was released on 11-2-2021: **THECB Awards \$26 Million to Two-Year Institutions Across Texas**

The Texas Higher Education Coordinating Board (THECB) has awarded \$26 million in grant funding to 46 public junior colleges, public state colleges, and public technical colleges across Texas to support students impacted by COVID-19. Institutions may use the Texas Reskilling and Upskilling through Education (TRUE) Institutional Capacity Grants to rapidly create, expand, or redesign short-term postsecondary workforce credentials and training programs in high demand occupational areas.

This opportunity is supported by an allocation Governor Greg Abbott and Texas' legislative leadership committed to the THECB from the federal [Governor's Emergency Educational Relief \(GEER\) Fund](#). More than 80% of qualified two-year institutions in Texas applied for and received funding. The THECB increased the funding available for TRUE grants by \$1 million to support these institutions' efforts.

Specifically for the Office of Student Financial Aid:

Recently released memos

- [11/04/2021 Texas College Work-Study \(TCWS\) FY 2022 Revised Final Allocations Memo \[PDF\]](#)
- [10/25/2021 State Financial Aid Program Updates FY 2022 Memo \[PDF\]](#)
- [10/14/2021 State Campus Based Programs FY 2021 Report Memo\[PDF\]](#)
- [10/14/2021 Bilingual Education Program FY 2021 End of Year Report Memo\[PDF\]](#)
- [10/06/2021 Financial Aid Database \(FAD\) FY 2021 \(2020-21\) Reporting Cycle 3 Memo\[PDF\]](#)
- [10/01/2021 Texas Application for State Financial Aid \(TASFA\) 2022-23 \(FY 2023\) Memo \[PDF\]](#)
- [09/29/2021 Updated Guidance on Statutory Requirements that Impact Financial Aid Programs Memo \[PDF\]](#)

Upcoming memos

- Updated GEER Return of Funds Form
- GEER Grant Close-out report
- Spring 2022 Institutional Calendar

Staffing changes

- FAS has hired three new staff members since our last meeting for the Operations Team:

	<ul style="list-style-type: none">○ The first is our own THECB staff member, Tiffany Williams-Robinson, who worked in Borrower Services as a Customer Service Representative and began her career with THECB agency in October 2019.○ The second new hire is Alex Bobe, who worked at the Art Institute as a Financial Aid Officer and a VA Certifying Official for over seven years.○ The third new hire is Anna Marie Shaw, who worked in higher education for over 15 years, ranging from Financial Aid Officer at the University of Phoenix, Financial Aid Supervisor at Virginia College in Austin, and her most recent the role as the Director of Financial Aid at The College of Health Care Professions in Austin.○ For those of you who worked with Troyling Johnson, she was promoted to Manager I in September. She will oversee various initiatives to support specific state financial aid programs that require additional oversight, along with several existing state financial aid programs.• FAS has begun the interview process for two Program Specialist III positions in the Communication/ Training area which is under the leadership of Leah Smalley. The hiring process should be finalized in November. Once the new team members are selected, they will be onboarded during the holiday season and go through training and preparations for the new 2022 calendar year.	
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§22.3. Student Compliance with Selective Service Registration

(a) An individual may not receive a loan, grant, scholarship, or other financial assistance funded by state revenue, including federal funds or gifts and grants accepted by this state, unless the individual files the [a statement of the individual's] Selective Service Statement of Registration Status [status] with the institution granting or certifying the financial assistance [as required by this section]. The language to be used in the Selective Service Statement of Registration Status is disseminated by Coordinating Board staff to institutions of higher education on an annual basis. Institutions may accept documentation from the Selective Service System of an individual's registration with the Selective Service in lieu of the required statement.

(b) An individual who has demonstrated registration with the Selective Service through the Selective Service Statement of Registration Status or acceptable Selective Service System documentation is not required to file a statement of the individual's selective service status the next time the individual makes an application for financial assistance to the same institution of higher education. [Rules and guidelines to be used in administering the Texas Education Code, §51.9095 will be the same as those used for students receiving federal financial aid.]

(c) This section does not apply to:

(1) a female individual, if females are not subject to general selective service registration under federal law; or

(2) an individual older than the maximum age at which an individual is required to be registered with the selective service system under federal law.

(d) Authority for this section is provided in Texas Education Code, Chapter 51, Section 51.9095.

§22.6. [Priority Deadline for] Applying for State Financial Aid

(a) Priority deadline:

(1) All general academic teaching institutions shall use January 15 as the priority application deadline to receive state financial aid.

(2) The priority deadline is not to serve as a determination of eligibility for state financial aid, but otherwise eligible students who apply on or before the deadline shall be given priority consideration for available state financial aid before other applicants. [For academic year 2018-2019 and prior academic years, general academic teaching institutions shall use March 15 as their priority application deadline for application for state financial assistance.]

(b) Texas Application for State Financial Aid (TASFA):

(1) The TASFA collects data necessary for determining state financial aid eligibility for those applicants classified as Texas residents, as outlined in Chapter 21, Subchapter B of this Part, who are not eligible to apply for federal financial aid using the Free Application for Federal Student Aid.

(2) Beginning with the financial aid application cycle for academic year 2023-2024 and thereafter, the online TASFA available through the ApplyTexas website is the sole, acceptable online TASFA. All institutions participating in financial aid programs covered by this chapter must accept the data generated by the completion of this online TASFA.

(3) Beginning with the financial aid application cycle for academic year 2023-2024 and thereafter, the TASFA document available through the ApplyTexas website is the sole, acceptable printable version of the TASFA, which institutions may accept from applicants who do not have access to the necessary technology to complete the online TASFA.

(4) An institution is not prohibited from requiring an applicant to submit additional information to accompany the data received via the TASFA. [Beginning with academic year 2019-2020 and hereafter, all general academic teaching institutions shall use January 15 as the priority application deadline to receive state financial assistance.]

(c) Authority for this section is provided in Texas Education Code, Chapter 56, Section 56.008 and Chapter 61, Section 61.07762. [The priority deadline is not to serve as a determination of eligibility for state financial assistance, but otherwise eligible students who apply on or before the deadline shall be given priority consideration for available state financial assistance before other applicants.]

§22.11. Provisions specific to the TEXAS Grant, TEOG, TEG, and Texas Work-Study Programs

(a) Funding. Funds offered through this program may not exceed the amount of appropriations, gifts, grants and other funds that are available for this use (§§56.303(c) and 56.403(c)) Texas Education Code).

(b) Authority to Transfer Funds.

(1) Institutions participating in a combination of the Toward EXcellence, Access and Success Grant, Texas Educational Opportunity Grant, Tuition Equalization Grant, and Texas College Work-Study Programs, in accordance with instructions from the Board, may transfer current fiscal year funds up to the lesser of 25 [10] percent or ~~\$60,000~~ [\$20,000] between these programs. This threshold applies to the program from which the funds are transferred.

Requests for such [Such] transfers must be submitted by the institution by the annual deadline published by the agency [occur by July 1 of the current fiscal year].

(2) Institutions participating in both the Texas College Work-Study Program and the Work-Study Student Mentorship Program, in accordance with instructions from the Board, may transfer current fiscal year funds up to 25 percent between the two programs. This threshold applies to the program from which the funds are transferred. Such transfers must occur by July 1 of the current fiscal year.

(c) Grant Uses. No state grant or work-study funding may be used for any purpose other than paying for any usual and customary cost of attendance incurred by the student related to enrollment at a participating institution of higher education for the academic year for which funding was offered.

(d) Over Awards. If, at a time after the grant has been disbursed by the institution to the student, the student receives assistance that was not taken into account in the institution's estimate of the student's financial need, so that the resulting sum of assistance exceeds the student's financial need, the institution is not required to adjust the grant under this program unless the sum of the excess resources is greater than \$300.

(e) Grant adjustments. If a student officially withdraws from enrollment, the institution shall follow its general institutional refund policy in determining the amount by which the financial aid is to be reduced. If the student withdraws or drops classes after the end of the institution's refund period, no refunds are due to the program. If for some other reason the amount of a student's disbursement exceeds the amount the student is eligible to receive, the financial aid should be recalculated accordingly.

(f) Re-offering of funds. Funds made available from grant adjustments may be re-offered to other eligible students attending the institution. If funds cannot be re-offered, they should be returned to the Board in accordance with §22.2 of this subchapter (relating to Timely Distribution of Funds).

(g) Late Disbursements.

(1) A student may receive a disbursement after the end of his/her period of enrollment if the student:

(A) Owes funds to the institution for the period of enrollment for which the grant is being made; or

(B) Received a student loan that is still outstanding for the period of enrollment.

(2) Funds that are disbursed after the end of the student's period of enrollment must be used to either pay the student's outstanding balance from his/her period of enrollment at the institution or to make a payment against an outstanding student loan received during that period of enrollment. Under no circumstances are funds to be released to the student.

(3) Documentation must be retained by the institution, proving the late-disbursed funds were used to make a payment against an outstanding balance at the institution from the relevant period of enrollment and/or to make a payment against an outstanding loan taken out for the period of enrollment.

(4) Unless granted an extension by the staff of the Coordinating Board, late disbursements must be processed prior to the end of the state fiscal year for which the funds were allocated to the institution.

DRAFT

2022 FAAC Proposed Meeting Dates

- March 3, 2022
- June 2, 2022
- September 8, 2022
- December 8, 2022