Financial Aid Advisory Committee (FAAC)

Date of Meeting: March 7, 2024
Time of Meeting: 9:30 a.m.
Location: Virtual Meeting

Texas Higher Education
COORDINATING BOARD

AGENDA

03-07-2024

1. Welcome, Introductions and Overview of Meeting Etiquette – Melet Leafgreen, Chair

2. Consideration of Approval of Minutes from December 7, 2023, FAAC meeting – Melet Leafgreen, Chair

3. Update: Prior FAAC Business – Leah Smalley, Senior Policy Director, THECB

4. Update: External Relations – John Wyatt, Senior Director, THECB

5. Presentation: Manageable Debt Calculation (MDC) Loan Program – Erika Norris, Manager II, THECB

6. Update: Texas Association for State Financial Aid Administrators (TASFAA)-Denise Welch, TASFAA President

7. Update: Legislative Subcommittee – Scott Lapinski, Legislative Subcommittee Chair

8. Presentation: Professional Communication is for the Birds – D. Ingram, Associate Director of Financial Aid, UT Southwestern Medical Center

9. Update: TASFA Subcommittee – Heather Fountain, TASFA Subcommittee Chair

10. Update: High School District – Lisa Schoenbrun, El Paso ISD, and Erica Ramos, Pharr-San Juan – Alamo ISD

11. *New* Discussion: Bridge the GAPS (Goals, Achievements, Progress and Solutions) – Committee Members

12. Update: Data Collection Subcommittee-Beth Tolan, Data Collection Subcommittee Chair

13. Update: Office of Student Financial Aid Programs – DeChà Reid, Director III, THECB and Leah Smalley, Senior Policy Director, THECB

14. Topic Recommendations for Future Meetings – Melet Leafgreen, Chair

15. Adjournment – Melet Leafgreen, Chair

Agenda Item # 2

Committee Members in Attendance (Virtual)	Committee Members in Attendance (Absent)
Melet Leafgreen, Chair Rachelè Garrett, Past Chair Cecilia Jones, Vice Chair Leah Smalley, THECB Rep DeChá Reid, THECB Rep Jackie Adler Mary Escobar Amy Wilson Scott Lapinski Gabby Leon Tevian Sides Jackie Kelly Heather Fountain Michelle Hill Tonya Richardson-Dean Beth Tolan Denise Welch Gilbert Zavala Lynda McKendree Erica Ramos	Rachel Joseph, Student Rep Lisa Schoenbrun Rebecca Moreno Adorno
Agenda Item 1. Welcome, Introductions and Overview of Meeting	**Melet Leafgreen, Chair**
Handout Provided: No	**Formal Decision/Action Required No**
Agenda Item 2. Consideration of Approval of Minutes from the meeting held on September 14, 2023	**Melet Leafgreen, Chair**
Handout Provided: Yes	**Formal Decision/Action Required Yes- minutes approved**
Summary: • No corrections were identified. ***See handout for agenda item #2 for information	
Agenda Item 3. Update: Prior FAAC Business-Discuss March Meeting date	**Leah Smalley, Senior Policy Director, THECB**
Handout Provided: No	**Formal Decision/Action Required Yes-dates voted on**

Summary:
• Upcoming FAAC Dates voted on:
   o March 7, 2024
   o June 6, 2024
   o September 12, 2024
   o December 5, 2024
All upcoming meetings will be virtual via Zoom	

Agenda Item 4. Update: External Relations	**John Wyatt, Senior Director, THECB**
Handout Provided: No	**Formal Decision/Action Required No**

Agenda Item # 2

Summary:

- This is the light time of the legislative calendar year
- Completed the fourth special session; special session focused on school the school voucher, unclear if there will be another special session
- After the start of 2024, Legislature will start to prep for the next session; Speaker of the House and Lt. Governor will announce their intermit charges. These are specific issues that committees are charged to look into. Committees will hold intermit committee meetings on the charges and ask for data and speakers to comment on the topic. Will produce a report on their findings; this typically occurs Mar-April
- THECB will work on the Legislative Appropriation Request- LAR (Budget Request). This is due in the summer of 2024
- THECB will continue to focus on student financial aid to ensure it is robust
- Question: Is the agency making recommendations to the Legislatures? The agency has taken a different approach to partner with stakeholders and Legislatures to communicate needs. Find out their priorities and working with the Legislatures on their priorities. We provide objective and expertise to the Legislature to help shape their decisions

Agenda Item 5. Presentation: Proposed Rules for January 2024 Board Meeting	Charles Contero-Puls, Assistant Commissioner, THECB
Handout Provided: Yes	**Formal Decision/Actions Required No**

Summary:

- *** See handout for more information

Agenda Item 6. Update: Data Collection Subcommittee	DeChà Reid, Director III, THECB
Handout Provided: Yes	**Formal Decision/Action Required No**

Summary:

- *** See handouts on committee meeting minutes
  - The Data Collection met on 11/16/2023, it was announced that the November meeting would be Dede Gonzales last meeting as Data Collection Chair since she has transitioned off FAAC as the TASFAA Board Representative. Dede will stay on as a member of the committee.
  - The agenda format changed to better align the new structure of SFAP division. The new structure now provides updates for the following areas: Projects, Operations, and Policy.
  - There was an update on the paper and online TASFA development as well as the launch of the GAPP for Block programs. The committee provided feedback on both items.
  - For Operations, we discussed the status of the FY 2023 FAD files and some of the workarounds due to the system limitations with the reconciling state programs. We went over the new FAD dates for 2023-2024. Cycle One is no longer required so the first submission of the FAD file will be in May or June 2024. THECB plans to add a new data element: Transfer Grant. Update Texas Leadership Scholar will be added as well. The manual should be available by early January. 2024-25 FAD Manual; The manual will undergo a complete redesign based on changes with FAFSA Simplification and new data security requirements. We are reviewing all data elements to determine if they are necessary to report on the FAD manual. Will solicit feedback from the committee. The goal is to release the manual by June 2024.
  - Set new committee meeting dates for calendar year 2024

Agenda Item 7. Discussion Topic: Selection of Subcommittee Chair for Data Collection	Melet Leafgreen. Chair
Handout Provided: No	**Formal Decision/Action Required Yes**

Summary:
- Nominations: Beth Tolan
- Motion: Rachele Garrett
- Second: Lynda McKendree
- All in favor of the nominations

   Beth Tolan will be the new Data Collection Subcommittee Chair

Agenda Item 8. Update: Legislative Subcommittee	Scott Lapinski, Legislative Subcommittee Chair

Prepared:12/13/2023/Finalized: 03/07/2024.

Reyne Guajardo

Agenda Item # 2

Handout: No	**Formal Decision/Action Required No**
Summary: • Delisa is the chair of the committee • Will have a meeting next week and will bring items for the upcoming Legislative session	

Agenda Item 9. Update: Texas Association for State Financial Aid Administrators (TASFAA) Subcommittee	**Denise Welch, TASFAA President**
Summary: • Schedule to have a TASFA Board meeting 12/11 and 12/12 • Will discuss the budget for TASFA • Conference Chair is already getting things in order for next year • Committees will begin meeting soon	

Agenda Item 10. Update: TASFA Subcommittee	**Heather Fountain, TASFA Subcommittee Chair, Leah Smalley, Senior Policy Director, THECB**
Handout Provided: No	**Formal Decision/Action Required No**

Summary:
• THECB released the 2024-25 for a review of the draft application
• THECB released draft version to institutions in November
   ○ See Announcement
   ○ Minimal comments were received
• The final versions will be available once the FAFSA is released on or before 12/31/23. Will be posted on the TASFAA, SFAP, and CFAT webpages
• Launch of the online TASFA is end of 2/2024
• The TASFA file layout and [Memo: 2024-25 Paper Application and Online File Layout]

Agenda Item 11. Presentation: 2024-25 Online TASFA Demonstration	**Leah Smalley, Senior Policy Director, THECB**
Handout Provided: No	**Formal Decision/Action Required No**
Summary: ***See webcast for demonstration	

Agenda Item 12. Update: High School Districts	**Lisa Schoenbrun, El Paso ISD; Erica Ramos, Pharr-San Juan-Alamo ISD**
Handout Provided: No	**Formal Decision/Action Required No**

Summary:
- Erica Ramos gave update about what is happening at ISD's
  - The ISD's have been pretty busy with trying to figure out how to condense 8 months of work into 5 months
  - Anticipating a lot of start and stop for parents that do not have SSN's and email addresses
  - Trying to be proactive with the population that will be impacted the most with the new changes with the FAFSA Simplification
  - There will be a lot of families that will not get past the FSAID, which is a new requirement
  - The concern for her population of student she serves are not US citizens and who will be discouraged from the new process of completing the FAFSA
  - Asking families to be patient and wants to support the families as much as possible
  - Working with students to complete the new FSAID
  - Committee member- Lynda McKendree suggested that it may help to tell students that they should wait a week or two when the FAFSA opens since ISIR's will not be released to schools until the end of January
  - Chair-Melet Leafgreen asked what FA Administrators can do to help ISD's with the challenges they are facing
    - ➤ Erica believes there may be an opportunity for ISD's to work with IHE's on a case by case basis with student that may have extenuating circumstances
    - ➤ IHE's have a clear process for verification and making documents available (on the website would be better)
    - ➤ Providing more clear instructions and resources that ISD's can give to students and not wait for Financial Aid Offices
    - ➤ Share more information and collaborating

Prepared:12/13/2023/Finalized: 03/07/2024.

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➢ Push back May 1st deadline to commit to an institution (Decision Day), so families do not feel rushed with making a choice where to go
- o Committee member-Denise Welch (Panola College) emphasized that certain deadlines only prioritize funding and not completing the FAFSA.
- o Encourage that the FAFSA nights are done with both students and parents

Agenda Item 13. Office of Student Financial Aid Programs	DeChà Reid, Director III, THECB
Handout Provided: No	Formal Decision/Action Required No

Summary:

Topics of Discussion-

- **2024-25 Program Guidelines**
  - o 2024-25 Program Guidelines are under review for all state financial programs, including waivers
  - o The goal is to release the guidelines in early May 2024
- **Update on Personnel Activity-** been pretty busy with hiring and promoting internal staff. To date, we hired or promoted the following individuals:
  - o Cindy Mars was promoted to Director I over the Loan Repayment team within SFAP-Operations, effective Oct. 16. Cindy has more than 25 years of experience in a variety of roles within financial aid administration, default prevention, student financial education, emergency grant administration, and training and development. She began her career as a financial aid counselor at UT Austin before moving into a consultant position at Trellis Company (formerly Texas Guaranteed), and for the last four years has led the Compliance and Data Reporting.
  - o SFAP has three distinct areas:
    - ➢ **OPERATIONS** conducts the business of SFAP, the output being the reason the SFAP division exists. Operations does this through implementing, enacting, managing, and maintaining financial aid programs. DeCha Reid oversees this area as Senior Director III.

- ➢ **POLICY** provides the overarching framework within which SFAP conducts its business. Policy does this by designing policies for practice and creating and evolving rules. Leah Smalley oversees this area as the Senior Policy Director

- ➢ **INNOVATION** provides divisional support for SFAP to be able to operate efficiently and effectively. Innovation does this through analyzing, formulating, building and constructing support systems, products and tools to support SFAP's business. Jeremiah Jarrell oversees this area as Deputy Assistant Commissioner.

- **Recently Released Memos:**
  11/27/23 State Work-Study Title III Eligibility Letter Memo
  11/27/23 License Plate Insignia (LP) FY 2023 End of Year Report Memo
  11/13/23 Grant and Aid Processing Platform (GAPP) Payment Process Announcement [PDF]

For more announcements visit: SFAP-Stay Connected
- **Upcoming Memos**
  - o Spring 2024 Institutional Calendar
  - o 2023-24 FAD Manual
  - o 2024-25 Award Amounts
- **Upcoming Deadlines**
  - o Deadline to submit the Title III Eligibility Form-12/11/2023
- **Past Deadlines**
  - o User Access Annual Review-due 11/10/2023; still missing 11 schools
  - o Certify FAD Cycles 3-11/13/2023, 32 schools have not certified as of today
- If schools have any items that are past due, they have been placed on HOLD in the GAPP system to request any state funds

Committee comments:
- None

Prepared:12/13/2023/Finalized: 03/07/2024.

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Agenda Item 14. Presentation: Hanging on Through the Turbulence: How to Navigate Around Work Burnout with Self Care	Teresa Washburn, Financial Aid Customer Service Coordinator, Houstin Community College, and Sophia McGee, Mgr. Financial Aid Services, San Jacinto College
Handout Provided: Yes	Formal Decision/Action Required No

Summary:
- Turbulence:
  - Lack of control
  - Unclear job expectation
  - Dysfunctional workplace dynamics
  - Unmanageable workloads
  - Confusing work responsibilities
  - Deadline pressure
  - And much more
- Do you think you're practicing Good Self-Care?
  - Loveisrespect.org/quiz
- Resources & Good Reads
  - Your institutional Employee Assistance Plan (EAP)
  - The Art of Saying No, by Damon Zahariades
  - The 7 Habits of Highly Effective People, by Steven Covey
  - Yoga at Your Desk (10 minutes)- link
  - 3 Minute Mindfulness Mediation- link

Agenda Item 15. Presentation: 2023 FAAC Annual Report	Melet Leafgreen, Chair
Handout Provided: No	Formal Decision/Action Required No

Summary:
- See handouts for annual report

Agenda Item 16. Feedback for Future Meetings	Melet Leafgreen, Chair
Handout Provided: No	Formal Decision/Action Required No

Summary:
- Guidance on set-aside and single term COA given the new SAI
- Manageable Debt Calculation
- Common challenges with the new FAFSA that can be addressed to the Dept. of Education

Agenda Item 17. Adjournment	Melet Leafgreen, Chair
Handout Provided: No	Formal Decision/Action Required Yes

Summary:
- Motion: Amy Wilson
- Second: Rachele Garrett
- Agenda Topics and Ideas makes sure to send to Melet, Cecilia and Leah

Reminder: Announcement- Expense Reports	Melet Leafgreen, Chair

Prepared:12/13/2023/Finalized: 03/07/2024.

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Manageable Debt Calculation (MDC)

CAL and FORWARD Loan Programs

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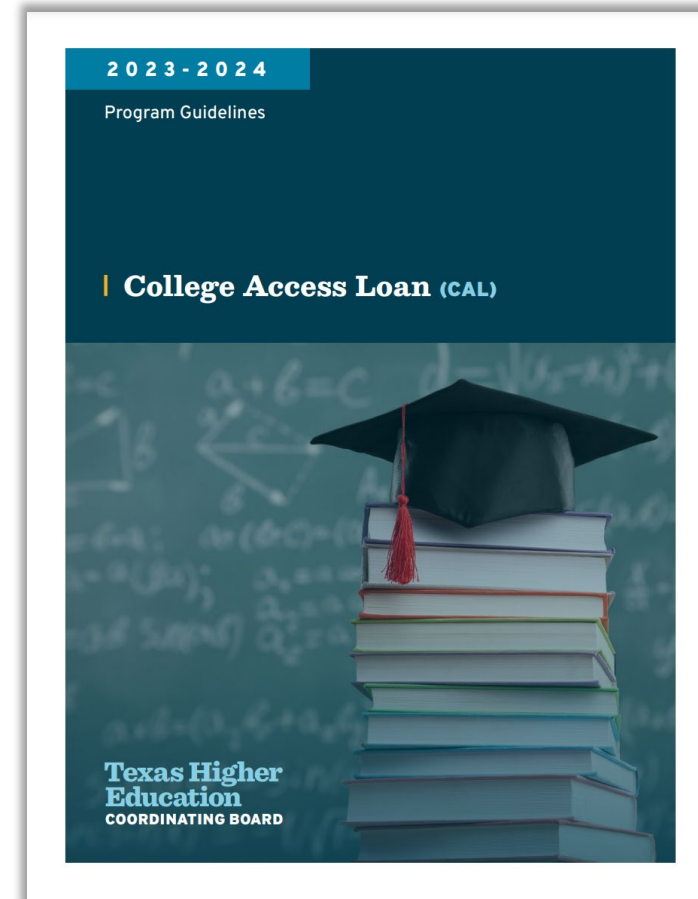# College Access Loan (CAL) Program

CAL Program

The CAL program provides alternative loans to Texas students at public and private institutions.

The current fixed interest rate is 5.85%.

Eligibility requirements:

- be classified by the institution as a Texas resident
- be registered with Selective Service, or be exempt
- be enrolled at least half-time
- Receive a favorable credit evaluation*
- meet institutional satisfactory academic progress (SAP) requirements
- cannot exceed manageable student loan debt as determined by the Texas Higher Education Coordinating Board

*Borrower or co-borrower must have a minimum Experian VantageScore of 650 to receive credit approval.

2023-2024
Program Guidelines

| College Access Loan (CAL)

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CAL Program Guidelines:
https://reportcenter.highered.texas.gov/agency-publication/guidelines-manuals/college-access-loan-fy-2024-guidelines/

CAL MDC Program Levels

MDC was adopted by the Texas Higher Education Coordinating Board on May 22, 2023, and went into effect September 1, 2023.

Undergraduate/Certification Programs

- The maximum aggregate loan amount for an eligible undergraduate student shall be limited to an amount of "manageable debt" determined by THECB.

- The maximum amount of student loan debt is based on a reasonable monthly student loan payment, taking into consideration the borrower's area of study, which can be found on the HHLoans webpage.

Graduate Program

- The maximum aggregate loan amount for an eligible graduate or professional student is the sum of the student's annual limits.

Figure: 19 TAC §22.49(d)

Area of Study	Average Annual Earnings (five years after graduation)	Reasonable Monthly Student Loan Payment (based on a 10-year repayment at an average 5% interest)	Reasonable Student Debt to Income Ratio	Maximum Amount of Student Loan Debt Used in College Access Loan Calculation
Agriculture and natural resources	$53,000	$442	10%	$50,350
Architecture and engineering	$83,228	$694	10%	$79,067
Arts	$45,210	$377	10%	$42,950
Biological and life sciences	$48,827	$407	10%	$46,386
Business	$59,123	$493	10%	$56,167
Communications and journalism	$49,098	$409	10%	$46,643
Computers, statistics, and mathematics	$68,246	$569	10%	$64,833
Education	$49,127	$409	10%	$46,671
Health	$60,398	$503	10%	$57,378
Humanities and liberal arts	$47,418	$395	10%	$45,047
Industrial arts, consumer services, and recreation	$49,907	$416	10%	$47,412
Law, public policy, and social work	$45,476	$379	10%	$43,202
Physical sciences	$59,588	$497	10%	$56,609
Psychology or undeclared major	$42,960	$358	10%	$40,812
Social sciences	$50,274	$419	10%	$47,760

MDC TAC Rule §22.49: Texas Administrative Code (state.tx.us)

Future Occupations & Reskilling Workforce Advancement to Reach Demand (FORWARD) Loan Program

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FORWARD Program
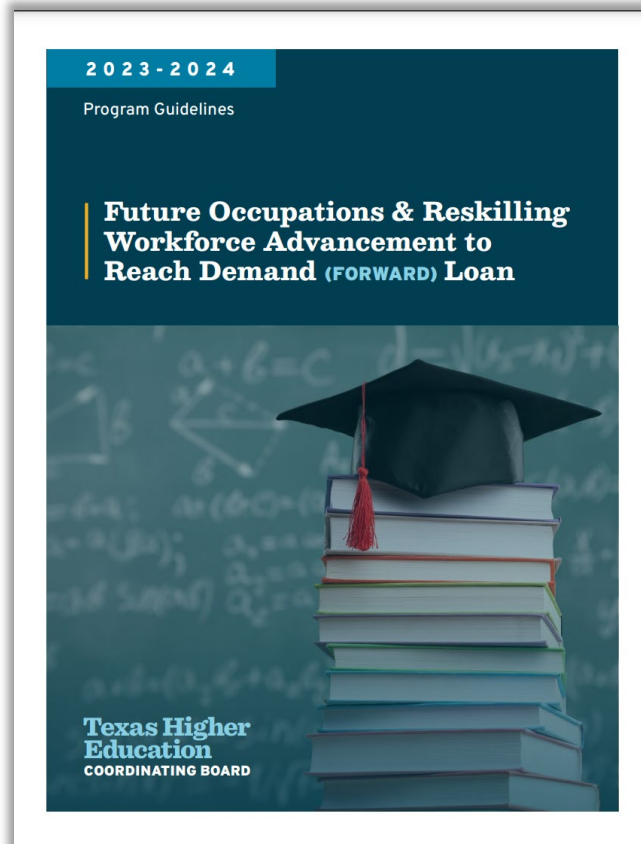
FORWARD Program Guidelines:
https://reportcenter.highered.texas.gov/agency-publication/guidelines-manuals/forward-loan-fy-2024-guidelines/

The FORWARD Loan Program is a low-interest loan designed for students enrolled in programs aligned with high-value credentials and high-demand occupations.

The current fixed interest rate is 3.85%.

Eligibility requirements:

- be classified by the institution as a Texas resident
- be registered with Selective Service, or be exempt
- meet the satisfactory academic progress requirements set by the institution
- receive a favorable credit evaluation or provide a cosigner who has good credit standing
- not exceed the manageable loan debt calculated by the THECB
- be enrolled in a High-Demand Credential program that the student will be able to complete in two years or less;

Additional enrollment requirements:

- If enrolled in a **degree program**, must have completed at least 50% of the required coursework prior to receiving a loan through the Program
- If enrolled in a **non-degree program**, the program's duration must be less than two years
- If enrolled in master's degree coursework, the master's degree must be part of a **combined baccalaureate-master's** program approved by the institution of higher education

*Borrower or co-borrower must have a minimum Experian VantageScore of 650 to receive credit approval.

FORWARD MDC Program Levels

MDC was adopted by the Texas Higher Education Coordinating Board on January 1, 2023, and went into effect February 18, 2023.

Students who have completed half their specific degree or complete a certification programs no more than 2 years within these fields:

- Energy

- Nursing/Patient Care

- Teaching

- Technology

- Transportation/Logistics

The maximum aggregate loan amount for any eligible student shall reflect the definition of manageable debt determined by THECB.

MDC TAC Rule §22.183: Texas Administrative Code (state.tx.us)

FORWARD Eligible Programs List

Loan Certification Process

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Loan Certification Checklist

- ✓ Program of Study
- ✓ CIP Code
- ✓ Grade Level
- ✓ Not Eligible to Certify Option
- ✓ Helmnet Checklist
- ✓ Manual Loan Certification

For more information on how to certify a loan, please refer to the August 30, 2022 webcast.

Home » Our Work » Supporting Our Institutions » Student Financial Aid Programs » Stay Connected » Webcast Archives

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Program of Study

- ✓ Institutions should search the Program Category by using the Program Subcategory (CIP Code)

- ✓ Institutions must select the Program of Study from the dropdown list

- ✓ Program must select the Program Subcategory (CIP Code) from the dropdown list

Grade Level

Institutions must:

✓ Select Grade Level

✓ Select Enrollment Status

✓ Verify Academic Loan Periods

✓ Confirm Anticipated Graduation Date

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11

Certification Eligibility

Institutions must select one:

✓ To Certify

✓ Not Eligible to Certify

Loan Application Checklist

Task	Completion Date	Responsibility
✔ Borrower Application Completed ⓘ	12/20/2023	Borrower
✔ Borrower Application Signed ⓘ	12/20/2023	Borrower
✔ Private Education Loan Applicant Self-Certification (BCF) Signed ⓘ	12/20/2023	Borrower
✔ Credit Approved ⓘ	12/20/2023	Lender
— Lender Approval Completed ⓘ		Lender
— School Certification Completed ⓘ		School
— Loan Guaranteed ⓘ		Lender
— Private Education Loan Approval Disclosure (LAD) Sent ⓘ		Lender
— Private Education Loan Approval Disclosure (LAD) Accepted ⓘ		Borrower
— Private Education Loan Final Approval (LCD) form Sent ⓘ		Lender
— Required Right to Cancel Waiting Period ⓘ		Borrower
— Ready to Disburse ⓘ		Lender

HelmNet Task List shows:

✓Borrower/Cosigner Application Completed
✓Credit Approved

School Certification is required for THECB to Complete Lender Approval (MDC) Review

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Manual Loan Certification

✓ Beginning September 1, 2023, Institutions will manually certify applications through the HelmNet portal.

✓ THECB will continue to send the School Certification Request (SCR) files in the CommonLine format.

✓ Institutions will not be able to return the school certification file back to the THECB using the CommonLine process.

✓ There is no specific timeline as to when the CommonLine process will be available to the schools.

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Loan Application Process

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Application Flow

The school's certification is required once the loan application receives credit approval. The "Manageable Debt Approval" is now the Lender Approval process and is reviewed after the certification has been received.

Online Application	•Student completes the online application and submits the promissory note and *Private Education Loan Application Self Certification* form.
Credit Approval	•THECB reviews the application for credit purposes.
Certification	•Institution submits the certification online through HelmNet portal.
Manageable Debt Approval	•THECB calculates the student's manageable debt to determine the final loan amount.
Private Education Loan Approval Disclosure	•*Private Education Loan Approval Disclosure* (or "LAD") is mailed to the student with instructions on how to accept the loan terms.
Loan Terms Accepted	•Student logs onto HelmNet to electronically select the *Acknowledge Loan Acceptance Disclosure Agreement.*
Private Education Loan Final Approval Disclosure	•*Private Education Loan Final Approval Disclosure*, or "Loan Consummation Disclosure" (LCD), is mailed to the student informing them of their right to cancel and indicating the earliest date for delivery of funds.
Funding	•Funds can be scheduled for disbursement after the seven-day cancellation period has expired.

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Manageable Debt Calculation (MDC)

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The Calculation

Amount approved by THECB will depend on:

- ✓ Borrower's Program of Study

- ✓ Current Educational Debt

Current Educational Debt

Included

- ✓ Education accounts that are open with an active balance on the tradeline (Experian)

- ✓ Private and federal loans

- ✓ New loans with a Loan Consummation Disclosure (LCD) generated

- ✓ Pending disbursements

Not Included

- ✓ Paid and Closed accounts

The Cosigner's debt is not included in the calculation

Possible Outcomes after MDC Review

FULL LOAN AMOUNT APPROVED

REDUCED LOAN AMOUNT APPROVED

LOAN CANCELLED

Manageable Debt Formulas

✓ Maximum Manageable Debt is determined by the Program Of Study

COA - EFA = Unmet Cost

✓ Unmet Cost must be equal to or less than the requested amount/certified amount

✓ Current Manageable Debt = All Open Educational Loans

✓ Maximum Manageable Debt - Current Manageable Debt = Allowable Manageable Debt

✓ Allowable Manageable Debt is the deciding factor for loan approval

Full Loan Amount Approval

24	Current Manageable Debt, Principal Balance of Student Loans									
25	$1,118	$10,000								
26	$3,500									
27	$3,595									
28	$2,000									
29	$2,750									
30	$10,000									

31		
32	Current Manageable Debt, Total	$32,963
33		
34	Pre-Manageable Debt	
35	Maximum Manageable Debt	$79,067
36	Less Current Manageable Debt	$32,963 *APU2: DEBT OTH*
37	Allowable Manageable Debt	$46,104 *APU2: DEBT TTL*
38	FORWARD Loan Amount Certified	$10,000
39	Eligible FORWARD Loan Amount	$10,000
40		
41	THECB Review	
42	Approved FORWARD Loan Amount	$10,000
43		
44	Post-Manageable Debt	$42,963
45		
46	Future FORWARD Loan Eligibility	$36,104
47		
48	Comments	
	Approved FORWARD Loan Amount = Eligible FORWARD Loan Amount	

Manageable Debt Calculation (MDC) Fo

✓ Borrowers Current Manageable Debt is $32,963

✓ Borrowers Allowable Debt is $46,104 and the certified requested amount was $10,000

✓ THECB would approve the Full Loan Amount of $10,000

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Full Loan Amount Approval

Loan status the amount of **$10,000**
(CLUID:

Status: Incomplete

	Task	Completion Date	Responsibility
✔	Borrower Application Completed ⑦	8/21/2023	Borrower
✔	Borrower Application Signed ⑦	8/21/2023	Borrower
✔	Private Education Loan Applicant Self-Certification (BCF) Signed ⑦	8/21/2023	Borrower
✔	Credit Approved ⑦	8/21/2023	Lender
✔	Lender Approval Completed ⑦	9/7/2023	Lender
✔	School Certification Completed ⑦	9/6/2023	School
✔	Loan Guaranteed ⑦	9/7/2023	Lender
✔	Private Education Loan Approval Disclosure (LAD) Sent ⑦	9/11/2023	Lender
—	Private Education Loan Approval Disclosure (LAD) Accepted ⑦		Borrower
—	Private Education Loan Final Approval (LCD) form Sent ⑦		Lender
—	Required Right to Cancel Waiting Period ⑦		Borrower
—	Ready to Disburse ⑦		Lender

HelmNet Task List

✓ Lender Approval Complete
✓ Loan Guaranteed
✓ Private Education Loan Approval Disclosure (LAD) Sent

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23

Reduced Loan Amount Approval

24	**Current Manageable Debt, Principal Balance of Student Loans**									
25	$1,118	$10,000								
26	$3,500	$20,000								
27	$3,595	$10,000								
28	$2,000	$10,000								
29	$2,750									
30	$10,000									
31										
32	**Current Manageable Debt, Total**		$72,963							
33										
34	**Pre-Manageable Debt**									
35	**Maximum Manageable Debt**		$79,067							
36	**Less Current Manageable Debt**		$72,963	*APU2: DEBT OTH*						
37	**Allowable Manageable Debt**		$6,104	*APU2: DEBT TTL*						
38	FORWARD Loan Amount Certified		$10,000							
39	Eligible FORWARD Loan Amount		$6,104							
40										
41	**THECB Review**									
42	Approved FORWARD Loan Amount		$6,104							
43										
44	**Post-Manageable Debt**		$79,067							
45										
46	**Future FORWARD Loan Eligibility**		$0							
47										
48	**Comments**									
	Approved FORWARD Loan Amount = Less Than School Certified Amount based to total current manageable debt									

Manageable Debt Calculation (MDC) Fo
Created 2/17/23: Revised 4/6

✓ Borrowers Current Manageable Debt Total increased to $72,963 which reduced the Allowable Manageable Debt to $6,104

✓ THECB will reduce the certified loan amount from $10,000 to $6,104 and Approve

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24

Reduced Loan Amount Approval

HelmNet Task List

✓ Lender Approval Complete
✓ Loan Guaranteed
✓ Private Education Loan Approval Disclosure (LAD) Sent

Amount of loan was reduced by THECB due to MDC

THECB Texas Higher Education COORDINATING BOARD

Reduced Loan Amount Approval

Texas Higher Education Coordinating Board
STUDENT FINANCIAL AID PROGRAMS
PO Box 12788, Austin, TX 78711-2788
800-242-3062 Fax: 512-427-6423
www.hhloans.com

September 7, 2023

Re: College Access Loan

Student Name: Mickey Mouse
Application # 8120890003W00N044
Institution: THECB University
Program of Study: Nursing Education

Our office recently received a certification for the College Access Loan (CAL) for student above. Changes have been made to the certified amount because the students' debt level for the chosen program of study exceeds the manageable debt level calculation.

One of the goals for the CAL program is for students to graduate with manageable student loan debt, meaning their monthly loan payment is no more than 10% of their gross earnings and they are able to pay off their student loan debt within 10 years. Additional information regarding eligibility for the CAL program is available under Texas Administration Code, Chapter 22, Subchapter C.

You may view the changes online at HelmNet (HHLOANS) Login.

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

Student Financial Aid Programs

For online account and payment information, please visit www.hhloans.com

Our office recently received a certification for the College Access Loan (CAL) for student above. Changes have been made to the certified amount because the students' debt level for the chosen program of study exceeds the manageable debt level calculation.

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Cancelled Loan Amount

24	**Current Manageable Debt, Principal Balance of Student Loans**								
25	$1,118	$10,000							
26	$3,500	$20,000							
27	$3,595	$10,000							
28	$2,000	$8,500							
29	$2,750	$7,550							
30	$10,000								
31									
32	**Current Manageable Debt, Total**	$79,013							
33									
34	**Pre-Manageable Debt**								
35	**Maximum Manageable Debt**	$79,067							
36	**Less Current Manageable Debt**	$79,013	*APU2: DEBT OTH*						
37	**Allowable Manageable Debt**	$54	*APU2: DEBT TTL*						
38	FORWARD Loan Amount Certified	$10,000							
39	Eligible FORWARD Loan Amount	$54							
40									
41	**THECB Review**								
42	Approved FORWARD Loan Amount	$0							
43									
44	**Post-Manageable Debt**	$79,013							
45									
46	**Future FORWARD Loan Eligibility**	$54							
47									
48	**Comments**								
	DENIED = Allowable Manageable Debt/Eligible Loan amount is less than $100.00								

Manageable Debt Calculation (MDC) Fo

✓ Borrowers Current Manageable Debt Total increased to $79,013 which reduced the Allowable Manageable Debt to $54

✓ THECB will cancel this loan because the Allowable Manageable Debt it less than $100

✓ THECB cannot issue a loan for less than $100

Loan Cancelled by THECB

After THECB completes the Manageable Debt Calculation:

✓ HelmNet Status will show as Canceled

✓ All remaining tasks will contain a red "X"

Loan Cancelled by THECB

Texas Higher Education Coordinating Board
STUDENT FINANCIAL AID PROGRAMS
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800-242-3062 Fax: 512-427-6423
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September 7, 2023

Re: College Access Loan
Student Name: Mickey Mouse
Application #: 8120890003W00N044
Institution: THECB University
Program of Study: Nursing Education

Our office recently received a certification for the College Access Loan (CAL) for the above student. The application has been cancelled because the students' debt level for the chosen program of study exceeds the manageable debt level calculation.

Our office recently received a certification for the College Access Loan (CAL) for the above student. The application has been cancelled because the students' debt level for the chosen program of study exceeds the manageable debt level calculation.

One of the goals for the CAL program is for students to graduate with manageable student loan debt, meaning their monthly loan payment is no more than 10% of their gross earnings and they are able to pay off their student loan debt within 10 years. Additional information regarding eligibility for the CAL program is available under Texas Administration Code, Chapter 22, Subchapter C.

You may view the changes online at HelmNet (HHLOANS) Login.

For online account and payment information, please visit www.hhloans.com

Letter emailed to the INSTITUTION's Financial Aid Director and Shared Mailed box requested on the User Access form

Letter is mailed to the STUDENT

Texas Higher Education Coordinating Board
STUDENT FINANCIAL AID PROGRAMS
PO Box 12788, Austin, TX 78711-2788
800-242-3062 Fax: 512-427-6423
www.hhloans.com

April 28, 2023

MICKEY MOUSE
123 ROYAL LANE
APT 3B
HOUSTON, TX 01234

Re: College Access Loan
Application # 8120890003W00N044
Institution: THECB University
Program of Study: Nursing Education

We regret to inform you that we are unable to continue processing your request for the College Access Loan (CAL).

Our records show that you applied for a College Access Loan (CAL) with the Texas Higher Education Coordinating Board (THECB). The THECB is unable to approve your loan request because the debt level you will accrue while enrolled in your chosen program of study exceeds the manageable debt level calculation. One of the goals and eligibility requirements of the CAL program is for students to graduate with manageable student loan debt; meaning their monthly loan payment is no more than 10% of their gross earnings and they can pay off their student loan debt within 10 years. Additional information regarding eligibility for the CAL program is available under Texas Administrative Code, Chapter 22, Subchapter C.

For questions, please contact Customer Support at (800) 242-3062, Monday through Friday, 8:00 a.m. to 5:00 p.m., CST.

For online account and payment information, please visit www.hhloans.com

Loan Canceled by School or Student

No communication is sent when a school or student cancels a loan.

Stay Connected

THECB | Texas Higher Education
COORDINATING BOARD

Contact Student Financial Aid Programs

The following phone lines are available for borrower and the public:

Borrower Services

- o Student Borrowers (Cosigners): **(800) 242-3062**

Contact Financial Aid Services in one of the following ways:

FAS Institutional Phone Line

- o Institutions Only: **(844) 792-2640**

Submit inquiries online through the <u>CONTACT US</u> web form.

Phone lines –
Hours of Operation:
Mon-Fri
8 a.m. to 5 p.m.
(Closed 12-1 daily)

Submit a CONTACT US

To ensure inquiries are routed correctly, complete these steps:

- Select "**Institution**" in Received From box

- Enter the institution's full name

- Always select "**Financial Aid Question**" as the Contact Reason

- Provide the best **direct phone number**

33

Questions?

Thank You!

Professional Communication Styles

Communication Style

ASKING

Judging Style ← FEELING | THINKING →

TELLING
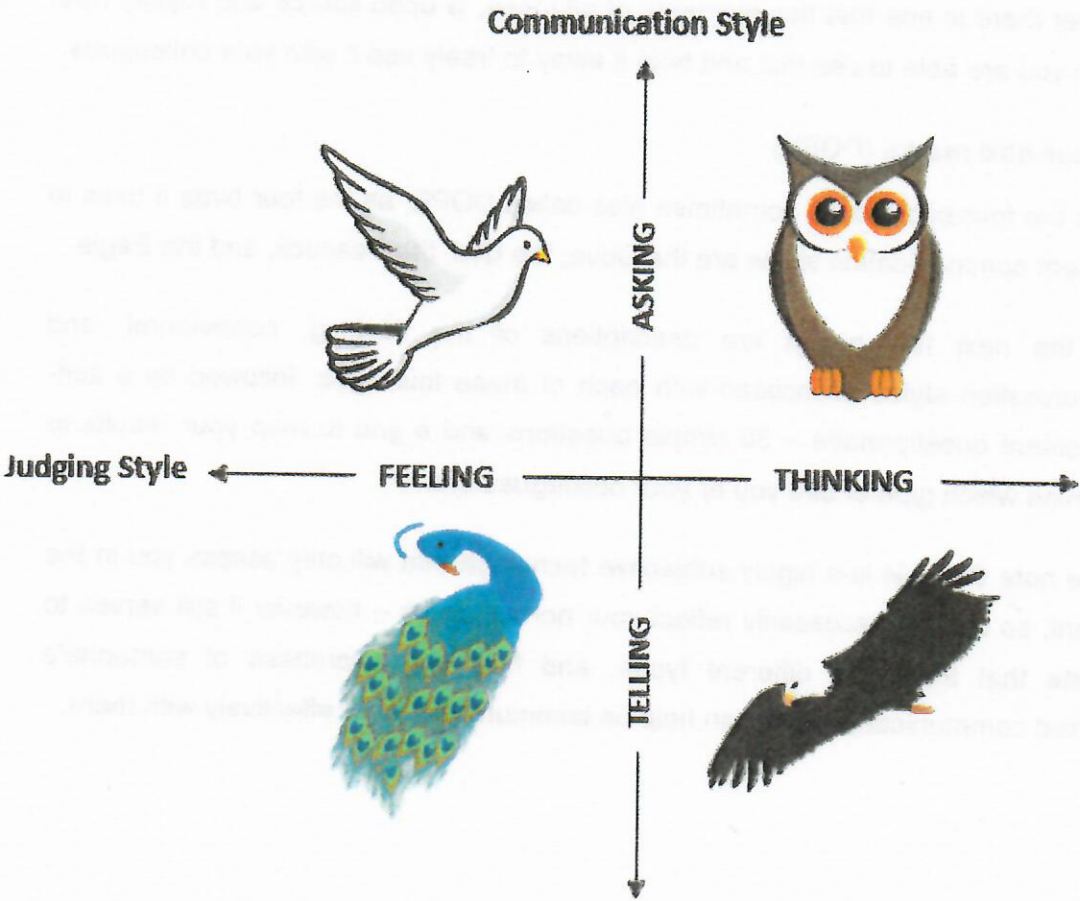
Mastering our relationships

Self-assessment of communication style

There are many profiling techniques that help you assess your own and your colleagues' styles of thinking, behaviour, or communication (e.g. MBTI/Myers-Briggs, DISC, HBDI/Herrmann, LSI/Human Synergistics, etc.).

These are usually licensed and protected from use by uncertified practitioners, however there is one that has elements of all those, is open source and royalty free, and so you are able to use that and take it away to freely use it with your colleagues.

The four-bird model (DOPE)

This is the four-bird model, sometimes also called DOPE, as the four birds it uses to represent communication styles are the Dove, the Owl, the Peacock, and the Eagle.

Over the next few pages are descriptions of the thinking, behavioural, and communication styles associated with each of these four birds, followed by a self-assessment questionnaire – 30 simple questions and a grid to map your results to determine which type of bird you or your colleagues are.

Please note that this is a highly subjective technique that will only assess you in the moment, so will not necessarily reflect your normal styles – however it still serves to illustrate that there are different types, and how our awareness of someone's preferred communication style can help us communicate more effectively with them.

Self-assessment questionnaire

Part 1: Assertiveness

I perceive myself as:

1	Quiet			Talkative
	1	2	3	4
2	Slow to decide			Fast to decide
	1	2	3	4
3	Going along			Taking charge
	1	2	3	4
4	Supportive			Challenging
	1	2	3	4
5	Compliant			Dominant
	1	2	3	4
6	Deliberate			Snappy
	1	2	3	4
7	Asking questions			Making statements
	1	2	3	4
8	Cooperative			Competitive
	1	2	3	4
9	Avoiding risks			Taking risks
	1	2	3	4
10	Slow / studied			Fast-paced
	1	2	3	4
11	Cautious			Care-free
	1	2	3	4
12	Indulgent			Firm
	1	2	3	4
13	Non-assertive			Assertive
	1	2	3	4
14	Mellow			Matter-of-fact
	1	2	3	4
15	Reserved			Outgoing
	1	2	3	4
Total		Total of values you selected above		
Average		Total divided by 15		

Part 2: Responsiveness

I perceive myself as:

1	Open 1	2	3	Closed 4
2	Impulsive 1	2	3	Deliberate 4
3	Using opinions 1	2	3	Using facts 4
4	Informal 1	2	3	Formal 4
5	Emotional 1	2	3	Rational 4
6	Easy to know 1	2	3	Hard to know 4
7	Warm 1	2	3	Cool 4
8	Excitable 1	2	3	Calm 4
9	Animated 1	2	3	Poker-faced 4
10	People-oriented 1	2	3	Task-oriented 4
11	Spontaneous 1	2	3	Cautious 4
12	Responsive 1	2	3	Non-responsive 4
13	Humorous 1	2	3	Serious 4
14	Impulsive 1	2	3	Methodical 4
15	Light-hearted 1	2	3	Intense 4
Total		Total of values you selected above		
Average		Total divided by 15		

Part 3: Communication style analysis

On the scale below, find where your average scores for **assertiveness** and **responsiveness** would sit, then find the point where lines drawn from both scores would intersect. The quadrant in which your scores cross indicates your dominant approach to communication.

Dove

Owl

1

2

Responsiveness

1   2   3   4

3

Peacock

Eagle

4
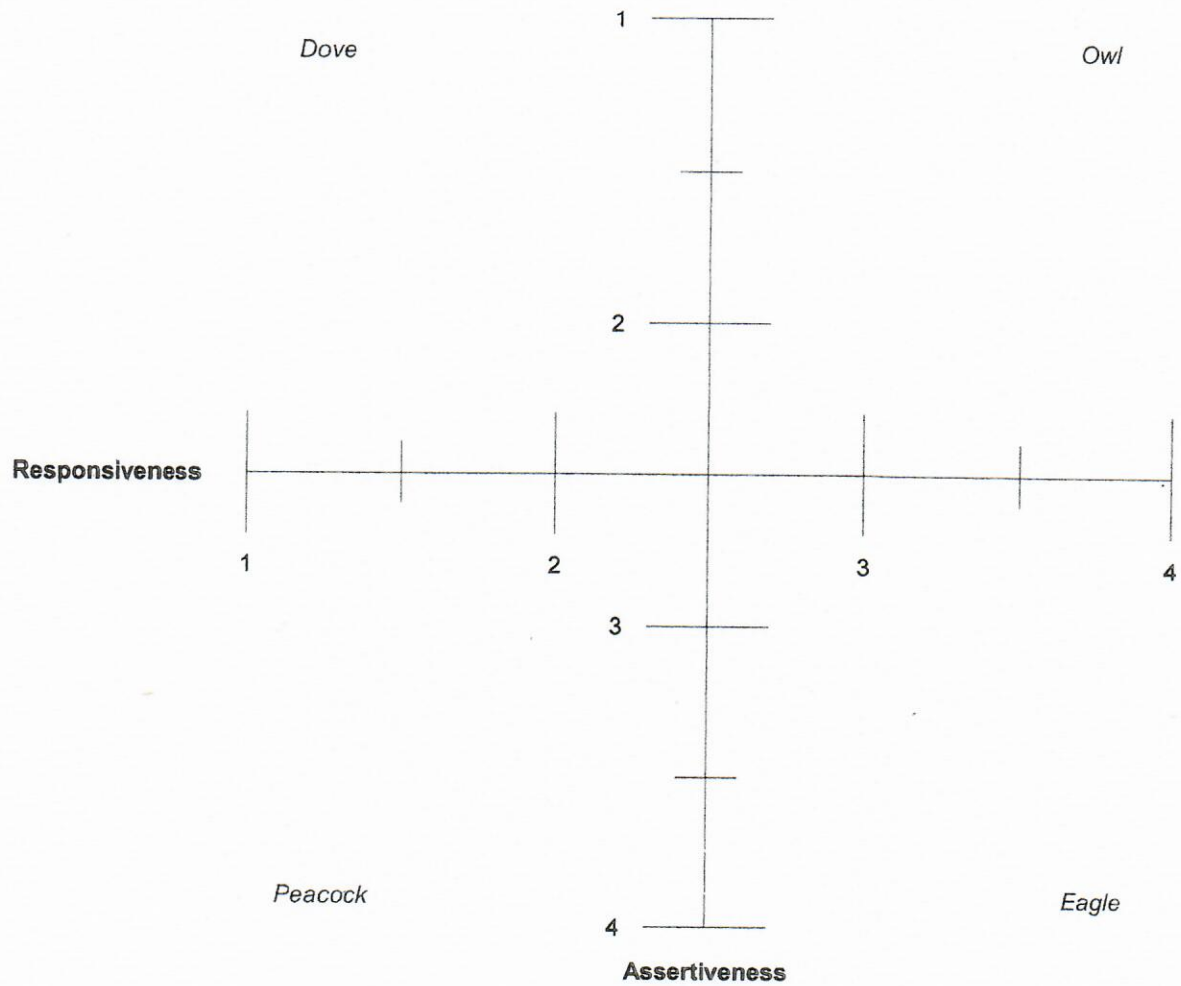
Assertiveness

The Dove

The **compassionate dove** is people-orientated, loyal, friendly hard working and a great team player but tends to avoid change, confrontation, risk-taking and assertiveness.

What doves do well

- A natural 'people person' and enjoy helping other people succeed.
- Good at building relationships and networking – the key to your success.
- Get fulfilment from satisfying social needs like friendship and sense of belonging.
- A team player, loyal, easy to get along with, patient and reliable.
- Happy to follow plans as part of a team, but not necessarily on your own.
- Motivated by relationships, shared goals, community service and the common good.

What to watch out for

- Not a natural goal setter, you focus more on the needs of others than your own.
- If you do set goals, they are more likely based on what other people think you should do rather than what you really want.
- Have difficulty confronting problems and asserting yourself.
- Tend to avoid conflict and risk taking, and resist change.
- Not a good planner and don't particularly like detail.

The Owl

The **wise owl** is logical, mathematically minded, methodical and sometimes seen as a perfectionist. You can be slow to make decisions and inflexible if rules and logic says otherwise. Not a big risk taker, but you love detail.

What owls do well

- Naturally curious and interested in gaining knowledge and becoming an expert.
- Thorough, meticulous, accurate, reliable, logical and good with details.
- Like rules, procedures and structure and are a careful (but cautious) planner.
- Think things through to minimise risk and the chance of things going wrong.
- Like being prepared and being in control through preparation and planning.
- Generally get along with other people, but have high expectations of their abilities.
- Motivated by knowledge, expertise and logic.

What to watch out for

- Tend to focus too much on details, and lose sight of the big picture.
- Plan everything to the extreme, taking too long to plan and not enough time to act.
- A perfectionist, focusing on doing the job right, rather than doing the right job.
- Don't like stepping out of your comfort zone or taking risks because you don't feel in control or prepared.

The Peacock

The **showy peacock** loves talking, being the centre of attention, has passion/ enthusiasm and is happy/ optimistic. They can be accused of talking too much, and aren't good with detail or time-control.

What peacocks do well

- Enthusiastic, influential, optimistic, passionate, people-orientated, charismatic.
- Continually seek new opportunities and experiences following your passions.
- Enjoy the journey as much as the result.
- Can take big risks for excitement and driven by passion – you dream big.
- Flexible and open-minded and tend to notice and seize opportunities.
- Enlist the help of others through your 'people-oriented' nature, and can work by yourself if necessary.
- Motivated by having fun, being popular and social.

What to watch out for

- Tend to value fulfilment over achievement, so often don't achieve specific goals.
- Like to focus on the big picture, often get lost in details through lack of planning.
- Not good at being thorough or sticking to details.
- Don't like structure, may be impulsive, bored by details, and easily get distracted.
- When the going gets tough, likely to give up and move on to something else.

The Eagle

The **bold eagle** is dominant, stimulated by challenge, decisive and direct. They can be blunt/ stubborn, can lose sight of the big-picture and can be insensitive to other people's needs, but are natural achievers.

What eagles do well

- Highly focused, driven and motivated
- Result focused goal setting is 'natural' to you.
- Not afraid of failure and just see it as a challenge to bounce back.
- Persistent in achieving goals, even if it takes personal sacrifices to get there.
- Take risks.
- Independent and like to do things "your" way. You don't like to fail.
- Like being productive and making progress.
- Motivated by power, challenge, results and achievement – a natural leader.

What to watch out for

- May lose sight of the big picture.
- May not pay enough attention to the detail, leading to lack of adequate planning.
- May choose goals for the thrill of the chase or from being impulsive, rather than well thought out goals that you really want.
- Can be inflexible, impatient and easily bored with detail, which can make you take needless risks.
- Can be stubborn and sometimes too confident for your own good.
- May value results over people.

Professional Communication Styles

It's for the Birds

Presented by: D. Ingram | Associate Director, UT Southwestern

Have you ever thought…

How can I improve my professional relationship with a coworker?

Why is it always challenging to interact with someone?

How can we make our meetings more productive?

How can I better communicate with students, parents, and coworkers?

Or, do you think anyone has ever had these questions about you?

A lack of communication breeds assumptions of what the other is thinking or feeling; and assumptions are, more often than not, incorrect.

Misty Lynn Walker

COMMUNICATION WORKS FOR THOSE WHO WORK AT IT.

John Powell

The biggest communication problem is we do not listen to understand.

We listen to reply.

Agenda

Understanding your communication style – personality survey
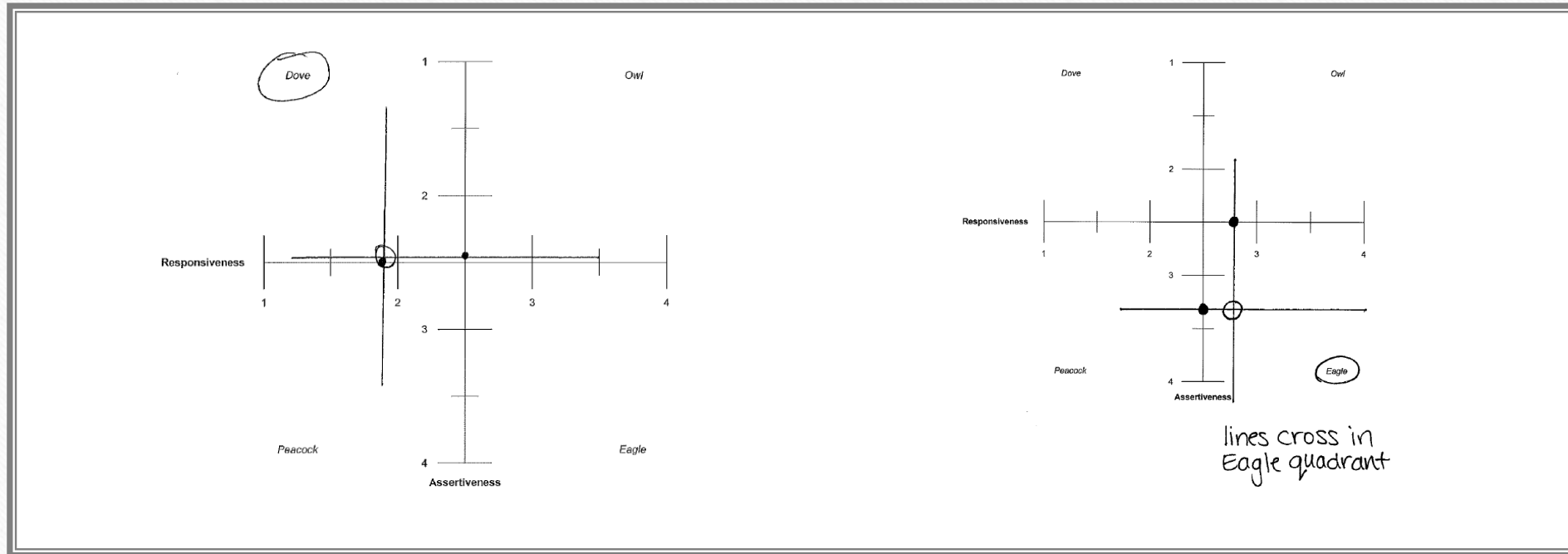
Understanding others' communication styles

How communication styles relate

About the test

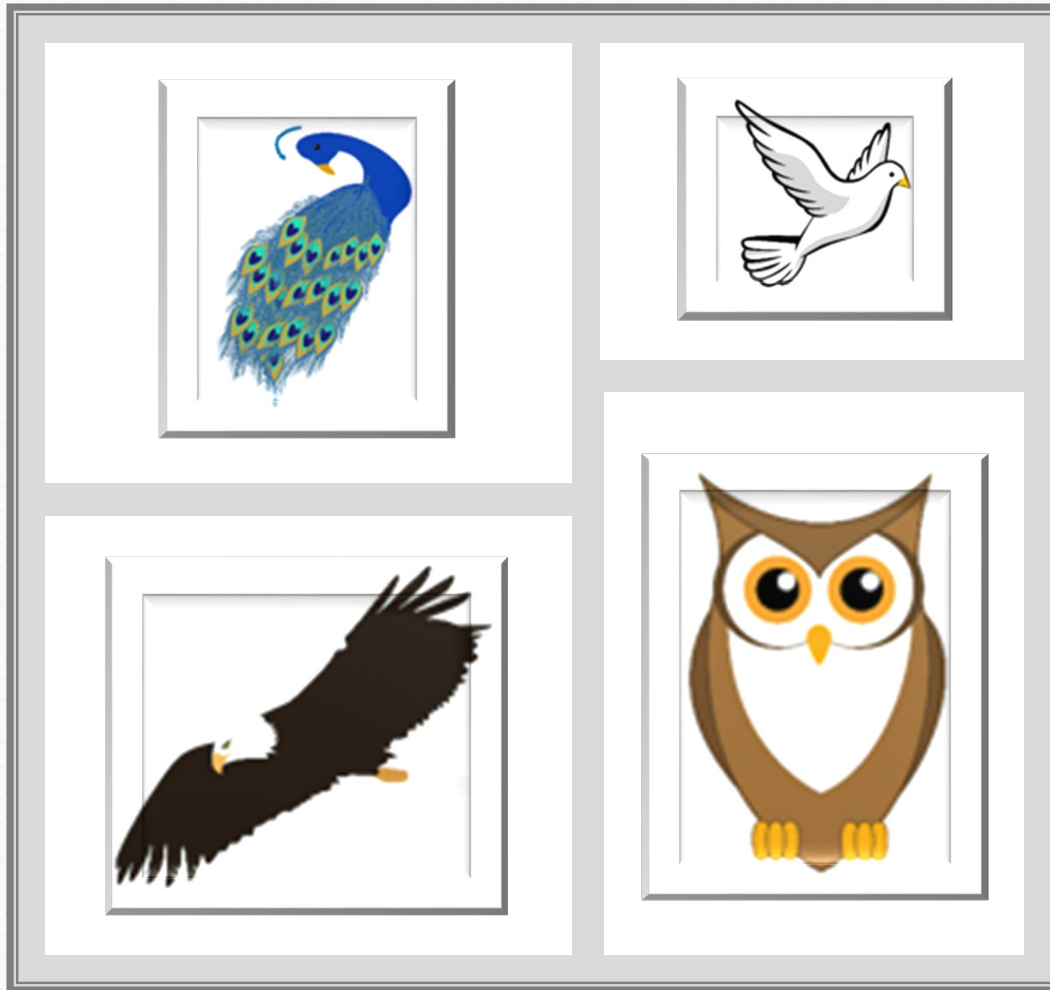- **Developed by Richard Stephenson based on four personality types formulated by Dr. Gary Couture**

- **Results of test correspond to a point in time**

- **Guide to how you would react**

- **Insight into coworkers and customers**

- **Think about work behaviors**

Graph your results

Which bird are you?

- **Quadrant shows preferred bird personality type**

- **What is your secondary bird type?**

Main Characteristics

- Dove – peaceful and friendly

- Owl – wise and logical

- Peacock – showy and optimistic

- Eagle – bold and decisive

- Remember you have two main bird types

- Can access characteristics of all birds in certain situations

Dove Strengths

People

Team Player

Loyal

Tenacious

Supportive

Networking

Dependable

Friendly

MOTIVATIONS:
- ***RELATIONSHIPS**
- ***SHARED GOALS**
- ***COMMUNITY SERVICE**
- ***COMMON GOOD**

Owl Strengths

People

Team Player

Loyal

Tenacious

Supportive

Networking

Dependable

Friendly

MOTIVATIONS:
- ***KNOWLEDGE**
- ***EXPERTISE**
- ***LOGIC**

Peacock Strengths

Optimistic

Influential

People

Big Dreams

Enthusiastic

Flexible

Seize the Day

Enjoys the Journey

MOTIVATIONS:

- ***SOCIAL CONNECTIONS**
- ***EXPERIENCES**
- ***POSITIVITY**

Eagle Strengths

Motivated

Leadership

Risk Taker

Highly Focused

Tenacious

Independent

Goal Setter

Productivity

MOTIVATIONS:
- ***CHALLENGES**
- ***POWER**
- ***RESULTS**
- ***ACHIEVEMENT**

Find your flock!!

Making the Connection

How do your strengths as a dove/owl/peacock/eagle help you in financial aid?

- Dove – people person.
  - Helpful because we get to work with all types of people
- Owl – enjoy learning.
  - Helpful because financial aid regulations are constantly changing
- Peacock – optimistic.
  - Helpful because parents may have negative outlook on paying for college
- Eagle – highly focused, driven.
  - Helpful because financial aid can be complicated and you won't give up

Dove Challenges

Not natural goal setters

Difficulties with confrontation and assertiveness.

Constantly neglects own needs to focus on others

Neglects details and planning

Avoids risk taking and change

Owl Challenges

Extreme planners

Too focused on details and forget the big picture

Focuses too much on planning and neglects to act

Perfectionist above all else

Avoids risk taking and change

Peacock Challenges

Avoids structure

If task is too difficult, likely to give up quickly

Difficulty achieving specific goals due to fulfillment focus
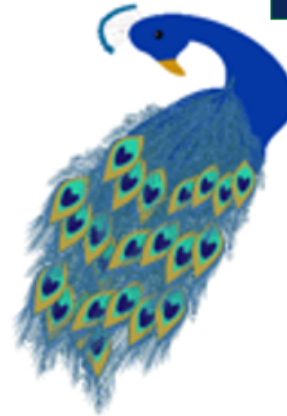
Neglects details and planning

Easily bored or distracted

Eagle Challenge

With your flock…

How might the challenges of your bird impact your work in financial aid?

What can you do to overcome these challenges?
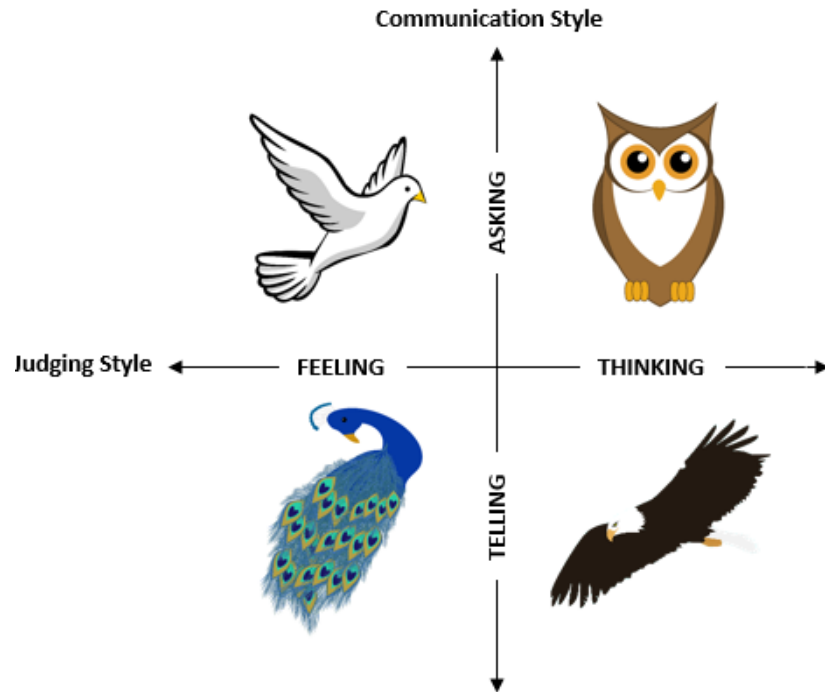
How the birds fit together

Doves vs. others

DOVES
Avoid excessive emotion and questions in decision making. Focus on facts of the task at hand.

OWLS
Focus conversations on the reasoning behind a decision and be sure it makes sense logically.

PEACOCKS
Conversations should focus on actions that will be needed. Be more direct.

EAGLES
Communicate the reasoning behind your decision, develop plan of action, and act on it.

Owls vs. others

OWLS
Avoid excessive questions and don't overthink the details of the process.

DOVES
Remember to consider the feelings of others and the social implications of decisions.

PEACOCKS
Conversations should focus on actions that will be needed and their emotional impact.

EAGLES
Focus on actions; results of those actions when communicating. What have you done to solve the problem?

Peacock vs. others

PEACOCKS
Avoid too much consideration of emotions and remember to think before acting.

DOVES
Remember to ask for input and include others' opinions in the decision making process.

OWLS
Communicate desire for collaboration by asking questions and let logic guide decisions.

EAGLES
Potential to share strong personality. Focus on goal and communicate logical reasoning behind decisions.

Eagles vs. others

EAGLES	**DOVES**
Remember to think things through before acting and listen to each other.	Remember to ask for input and consider the person and feelings that the decision will affect.
OWLS	**PEACOCKS**
Allow for questions about the process and communicate the steps of the plan to achieve goals.	Potential to share strong personality. Remember to consider feelings and social implications of decisions.

Migrate with your flock…

- **How might you constructively respond to a…**

  - **Student who is frustrated with the verification process**

  - **Parent who is upset that their student did not get more scholarships**

  - **Supervisor with whom you would like a better working relationship**

  - **Coworker who you will be working with on a project**

Maya Angelou

"I've learned that people will forget what you said, people will forget what you did, but people will never forget how you made them feel."

AGENDA Item #12: FAAC Data Collection Sub-Committee Meeting

Feb. 29, 2024: 9:30–11:30am

Location: Microsoft Teams meeting

Project Updates: • **2024-25 Online TASFA** The 2024-2025 Online Texas Application for State Financial Aid (TASFA) opened February 29, 2024. THECB emailed the following underline announcement on the same day. Note: THECB is delaying AY25 TASFA files to the counselor suite until the Department of Education releases AY25 ISIRs/allows for student update. Universities will start receiving AY25 TASFA files immediately. **THECB Email Subject Line, 2/29/2024:** NOW AVAILABLE: 2024-25 (FY 2025) Online Texas Application for State Financial Aid (TASFA) **Partial Content:** *"The Texas Higher Education Coordinating Board (THECB) announces the launch of the 2024-25 (FY 2025) Online Texas Application for State Financial Aid (TASFA). The application can be found by visiting the TASFA landing page, located on the THECB's main website.* *Institutions will begin receiving TASFA data files daily through MOVEit DMZ if a student submits the 2024-25 online form. As a reminder, all institutions participating in state financial aid programs must accept the data generated by the completion of the online TASFA. Institutions may accept the paper TASFA from applicants who do not have access to the necessary technology to complete the online TASFA. Institutions can require an applicant to submit additional information to accompany the data received on the paper or online (see Texas Administrative Code, Section 22.6)."*	Leah S
Operational Updates: • **2024-25 FAD Manual** **2024-2025 FAD Manual** is currently being worked on with goal to release by June 2024. Manual is being updated to account for 2024-2025 FAFSA updated (i.e., Simplification) **2023-2024 FAD** reminder beginning 2023-2024, Cycle 1 of FADS is no longer required. The "First Reporting Cycle" will be skipped. The deadline dates and requirements for the "Second Reporting Cycle" and "Third Reporting Cycle" will be used. The "**Second Reporting Cycle**" will be *first file* required for AY24: • First Day to Submit File is May 29, 2024. • Deadline to Submit Initial File is June 12, 2024. • Deadline to validate student data is July 17, 2024. The "**Third Reporting Cycle**" will be 2nd and final FAD file required for AY24. • First Day to Submit File is September 18, 2024. • Deadline to Submit Initial File is October 9, 2024. • Deadline to reconcile state programs & certify student data is November 20, 2024. It is critical that schools meet the deadline to submit both initial and final file deadlines for the Second and Third FAD Reporting Cycles. THECB must have schools' files on time to meet their reporting requirements.	DeCha R., Tanitia, C., and Tanya T.

FYI: 2023-2024 FAD Manual has the following new data elements:

- Texas Transfer Grant [119]
- Texas Leadership Scholars [120]
- Nursing Scholarship [121]

Committee Discussion: Question asked to confirm if Texas Leadership Scholars new data element is for the non-GEER AY24 portion awarded in Spring 2024 (i.e., since Fall 2023 was GEER Funded).

- **GAPP - Intent to Participate**

An "Intent to Participate" notice was generated via GAPP to Financial Aid Directors which required a retraction to be sent. The link provided will not work, message should be disregarded.

Update: The following retraction was issued March 1, 2024, via THECB email announcement.

THECB Email Subject Line, 3/1/2024:
IMPORTANT NOTICE: 2024-25 (FY 2025) Intent to Participate Email

Partial Content:

"… an FY 2025 Intent to Participate email (2024-25 Texas State Financial Aid OPT-IN/OPT-OUT Form) was inadvertently generated through the Grant and Aid Processing Platform (GAPP) system. The window for submission has been closed.

A separate communication will be sent to the Directors of Financial Aid to submit their institution's participation confirmation for the following programs:

- *Educational Aide Exemption (EAE)*
- *Financial Aid for Swift Transfer (FAST)*
  - *Note: FAST Spring 2024 OPT in due date is March 15, 2024*
- *Texas Transfer Grant (Transfer Grant)*

Committee Discussion:

- Texas College Work Study is a 2-year agreement.
- The AY25 FAST Agreement will be for the entire year.
  - AY24 had a "by semester' option due to the rapid implementation of the program (i.e., some schools could not participate for fall 2023 but could for spring 2024).
- Texas Leadership Scholars funding will be available via GAPP, anticipated mid-March.

- **GAPP - Transfer Request**

The Grant and Aid Processing Platform's (GAPP) Request Tile has been experiencing an issue that prevents institutions from submitting a Transfer Request. This issue has not been resolved.   We do not have an anticipated date for fix, to date.

- **Award History**

The Award History File, uploaded through MOVEit DMZ, has been experiencing technical difficulties that are preventing award history files from being processed. This issue has not been resolved.   We do not have an anticipated date for fix, to date.

Committee Discussion: Lack of Award History File creates challenges in awarding aid state aid to transfer students. Committee members inquired about the possibility of restoring the prior state aid confirmation method in the interim.

	• **Administering Texas First and Transfer Grant** **Texas First Scholarship Program** 2023/2024 Rule Changes: • Expanded institutional eligibility from ten institutions to *all* Texas public institutions of higher education. • Updated to clarify aid year and term definition. **Roster Updates** • Added *date of high school graduation* on the roster • Moved *date roster issued by THECB* to column G Updated rosters available **Friday, March 1**, via the institution's **Grant_Output** folder in MOVEit DMZ. Texas First Scholarship training will be provided during THECB's March 21, 2024, webcast. **Transfer Grant** Transfer Grant is state funded as of AY24. Schools will be able to submit Intent to Participate in Spring 2024 for 2 years (AY2024 and AY2025). AY24 funds can be carried forward to AY25. Texas Transfer Grant will not require a separate agreement. The program is covered under our existing State PPAs. Individual award amounts and EFC/SAI priority will be in alignment with TEXAS Grant. Available to 4-year schools, each school's allocation will depend upon the overall state allocation and number of schools who OPT in. Program guidelines will be available for 2024-2025. Note: Rules establishing procedures to administer the program can be found in Texas Administrative Code, Title 19, Part 1, Chapter 22, Subchapter K.	
	Policy Updates: This topic will provide updates on any upcoming policy changes affecting state financial aid programs. Adopted Rules in January: The Board, on January 25, 2024, adopted rules that impacted state aid programs. See February 2, 2024 "Proposed Rules Impacting State Financial Aid and Loan Repayment Programs" email from THECB and 2/22/2024 NOTICE: State Financial Aid Update, Reminders, and Upcoming Deadlines Memo. THECB will notify Financial Aid Directors via email when rules changes related to financial aid administration are proposed so that schools are aware and can submit comments to THECB. When notification of proposed rules has been done in the past, it resulted in a lot of input from the financial aid community for the proposed rules shared. Update: Schools no longer required to send their TPEG rules with the state campus-based funds report. Schools still need to maintain TPEG rules but are no longer required to submit with the annual report. In July, two programs that were previously defunded are being rolled out again: • Nurse Scholarship Program • Nurse Loan Repayment program This is in the pipeline, notices will be forthcoming. Upcoming Rules for April – to be discussed at next subcommittee meeting (April 25, 2024).	Leah S.

Update on Office of SFAP: This topic will provide an update on the activities happening in the Office of Student Financial Aid Programs. 2024-2025 State Financial Aid Program Guidelines are forthcoming! • There will be additional exemption and waiver guidance included. AY25 Priority Deadline extended from March 15 to April 15, 2024 (2/27/2024 memo). March 15 is FAST OPT in Deadline and Good Neighbor Program recommendation deadline. THECB has created a new form for institutions to request online training. An email notification sent (2/22/2024) and the online SFAP Training Request Form is available on the SFAP webpage under "Stay Connected". Committee Discussion: As federal aid requirements do not allow for the proration of SAI, requested confirmation of impact to state aid administration. THECB confirmed state aid programs would follow federal need calculation requirements (i.e., no proration of SAI for state aid consideration).	DeCha R.

Discussion Topic: Name change for the sub-committee
 	
This topic will gather feedback from the committee to collect ideas on rebranded the committee name.
 	
Committee discussed changing the name of this subcommittee from the "Data Collection" Subcommittee due to the evolution of the subcommittee charge from its inception.
 	
Initially, the subcommittee focused on the 2017/2018 conversion of the FAD report. Currently, this subcommittee discusses policies, programs, and data collection.
 	
   • Policy Development: Collaborating on the creation and review of financial aid policies to ensure they align with organizational goals and industry best practices.
 	
   • Program Enhancement: Identifying areas for improvement in existing processes and proposing innovative solutions to enhance efficiency and effectiveness.
 	
   • Review and Evaluation: Participating in the review and evaluation of financial aid applications, forms, and guidelines to ensure fair and consistent decision-making based on established criteria.
 	
Names suggested:
   • Programs and Processes Advisory Committee
   • Financial Aid Operations Subcommittee
	Committee