

State Financial Aid Monthly Webcast

March 1, 2023

Topics of Discussion



Online TASFA
Updates

FORWARD Loan
Program

FAD
Data Submission
Portal

Notifications and
Deadlines

Questions?

Online TASFA

Updates

Online TASFA Update

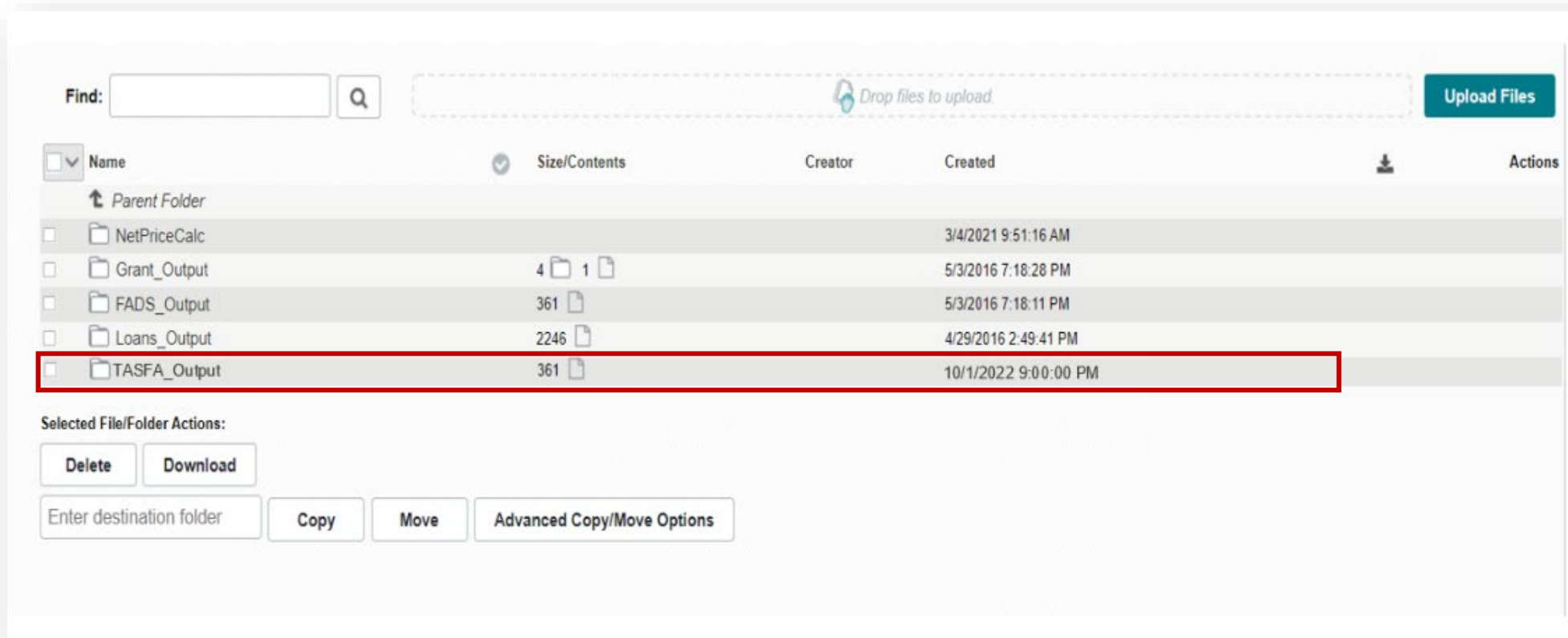


2023-2024 Online TASFA

- Scheduled to open in Spring 2023.
- Low volume of TASFA submissions is expected since many students already completed paper version.
- Training on the application and file transmission process will be provided prior to opening the TASFA.
- Test files are still being tested by the THECB.
- Updated File Layout document will be sent in March.

Data File Transmission

TASFA files will be sent to institutions through a secure file transfer protocol (SFTP) using the THECB's online portal, [MOVEit DMZ](#). Each institution will have a dedicated **TASFA_Output** folder.



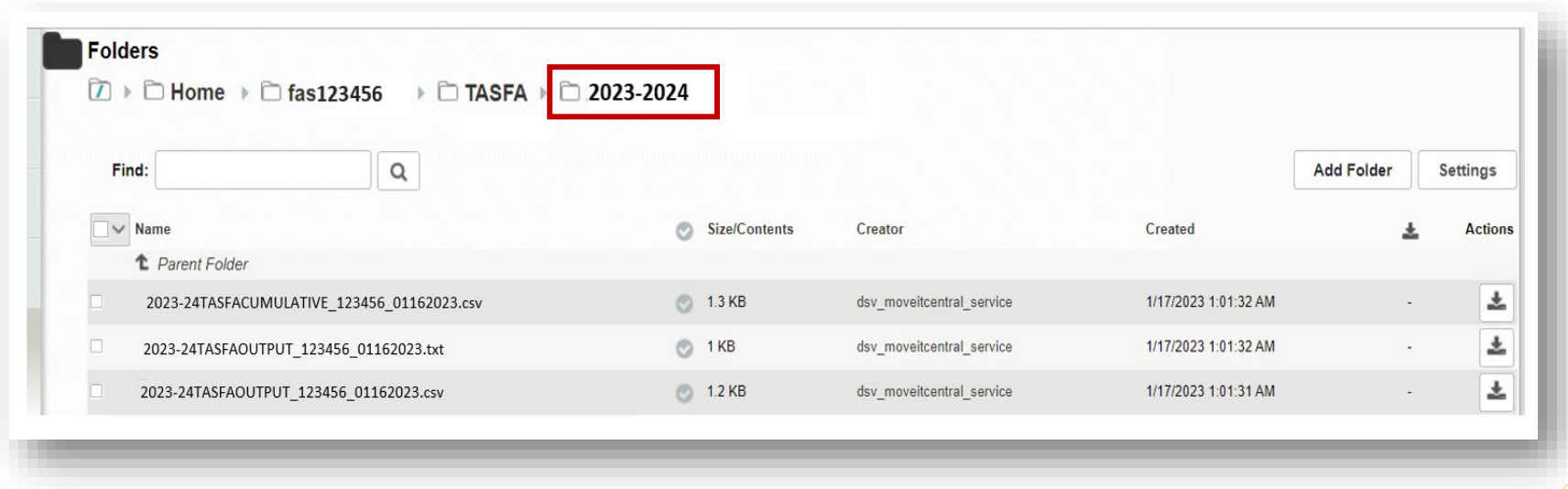
Find:

| <input type="checkbox"/> Name | <input checked="" type="checkbox"/> Size/Contents | Creator | Created | Actions |
|--|---|---------|----------------------|---------|
| <input type="button" value="Parent Folder"/> | | | | |
| <input type="checkbox"/> NetPriceCalc | | | 3/4/2021 9:51:16 AM | |
| <input type="checkbox"/> Grant_Output | 4 <input type="button" value="Folder"/> 1 <input type="button" value="File"/> | | 5/3/2016 7:18:28 PM | |
| <input type="checkbox"/> FADS_Output | 361 <input type="button" value="File"/> | | 5/3/2016 7:18:11 PM | |
| <input type="checkbox"/> Loans_Output | 2246 <input type="button" value="File"/> | | 4/29/2016 2:49:41 PM | |
| <input type="checkbox"/> TASFA_Output | 361 <input type="button" value="File"/> | | 10/1/2022 9:00:00 PM | |

Selected File/Folder Actions:

Data File Transmission

Files will be uploaded into TASFA_Output folder under the applicable award year using a batch process by the THECB.



- Daily cumulative report (per award year) – CSV format
- TASFA Submission File – Fixed-Length Text File format
- TASFA Submission Files – CSV format

FAFSA Simplification

Impacts on TASFA

2024-25 TASFA

- The paper TASFA (English and Spanish) will incorporate FAFSA changes once Department of Education releases them in 2023.
- A 2024-25 File Layout will be sent once changes to FAFSA are identified and the Online TASFA updates are confirmed.
- The State Priority Deadline (Jan. 15) is being reviewed by the THECB to determine if modifications are possible, if the FAFSA is delayed.



FORWARD Loan Program

Future Occupations & Reskilling Workforce Advancement to
Reach Demand

Now Available **FORWARD Loan Program**

Future Occupations & Reskilling Workforce Advancement to Reach Demand (FORWARD) Loans has several unique characteristics:

- Eligibility tied to high-value/high-demand credentials
- A low interest rate - 3.35%
- Borrowing limits and repayment will be tied to the student's calculated manageable debt
- CommonLine file processing is not yet available for this program

2022-23 Program Guidelines

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

**Texas Higher
Education**
COORDINATING BOARD

High-Value/High-Demand Credentials

This program is limited to students enrolled in specific programs within the fields of:

- Energy
- Nursing/Patient Care
- Teaching
- Technology
- Transportation/Logistics

FORWARD Loan

Eligible Programs of Study
FY 2023 (2022-2023)

Texas Higher
Education
COORDINATING BOARD

The Future Occupations & Reskilling Workforce Advancement to Reach Demand (FORWARD) Loan Program is a low-interest loan designed for students enrolled in programs aligned with high-value credentials and high-demand occupations. This program is limited to students enrolled in specific programs within the fields of [Energy](#), [Nursing/Patient Care](#), [Teaching](#), [Technology](#), and [Transportation/Logistics](#). To read more about this program, visit [hhloans](#).

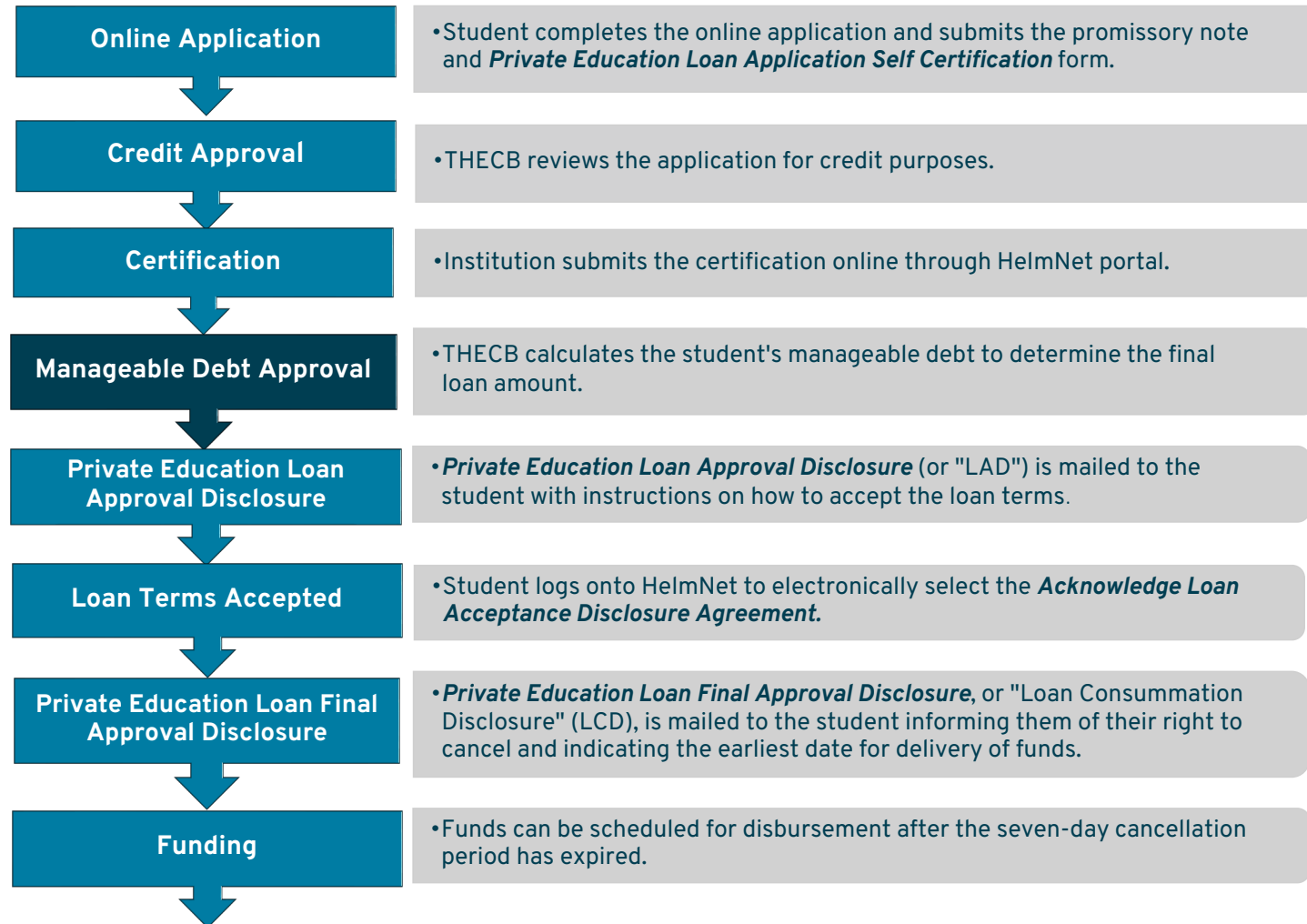
Energy

| Program Name/Description | CIP Code |
|--|----------|
| Aircraft Powerplant Technology/Technician | 47.0608 |
| Alternative Fuel Vehicle Technology/Technician | 47.0614 |
| Biochemical Engineer | 14.4301 |
| Bioenergy | 03.0210 |
| Biological/Biosystems Engineering | 14.4501 |
| Chemical and Biomolecular Engineering | 14.0702 |
| Chemical Engineering | 14.0701 |
| Chemical Engineering Technology/Technician | 15.0615 |
| Chemical Process Technology | 41.0303 |
| Electrical and Electronics Engineering | 14.1001 |
| Electrical and Power Transmission Installation/Installer, General | 46.0301 |
| Electrical and Power Transmission Installers, Other | 46.0399 |
| Electrician | 46.0302 |
| Electromechanical Engineering | 14.4101 |
| Energy and Environmental Policy | 03.0209 |
| Energy Management and Systems Technology/Technician | 15.1701 |
| Energy Systems Engineering General | 14.4801 |
| Energy Systems Engineering, Other | 14.4899 |
| Energy Systems Installation and Repair Technology/Technician | 47.0701 |
| Energy Systems Technologies/Technicians, Other | 15.1799 |
| Energy, Environment and Natural Resources Law | 22.0207 |
| Engineering Physics/Applied Physics | 14.1201 |
| Environmental/Natural Resource Economics | 03.0204 |
| Geothermal Energy System Installation and Repair Technology/Technician | 47.0706 |
| Geothermal Energy Technology/Technician | 15.1706 |
| Hydraulics and Fluid Power Technology/Technician | 15.1103 |

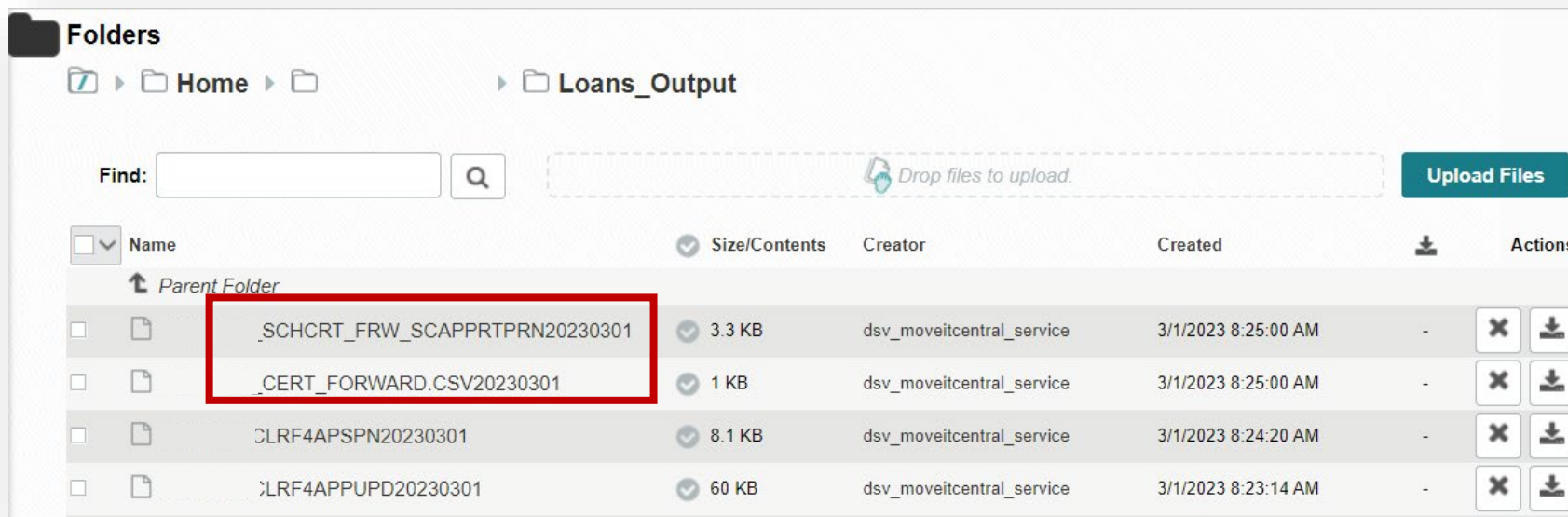
Eligible Programs of Study

<https://reportcenter.highered.texas.gov/agency-publication/miscellaneous/forward-program-fy-2023-high-demand-credentials-listing/>

FORWARD Application Flow



Certification Files in MOVEit



The screenshot shows the MOVEit file management interface. At the top, the breadcrumb path is 'Home > Loans_Output'. Below this is a search bar labeled 'Find:' and a dashed box for file uploads with the text 'Drop files to upload.' and an 'Upload Files' button. The main area displays a table of files with columns: Name, Size/Contents, Creator, Created, and Actions. The file '_SCHCRT_FRW_SCAPPRTPRN20230301' is highlighted with a red box.

| <input type="checkbox"/> | Name | Size/Contents | Creator | Created | | Actions |
|--------------------------|--------------------------------|---------------|---------------------------|---------------------|---|---|
| <input type="checkbox"/> | Parent Folder | | | | | |
| <input type="checkbox"/> | _SCHCRT_FRW_SCAPPRTPRN20230301 | 3.3 KB | dsv_moveitcentral_service | 3/1/2023 8:25:00 AM | - | <input type="checkbox"/> <input type="checkbox"/> |
| <input type="checkbox"/> | _CERT_FORWARD.CSV20230301 | 1 KB | dsv_moveitcentral_service | 3/1/2023 8:25:00 AM | - | <input type="checkbox"/> <input type="checkbox"/> |
| <input type="checkbox"/> | CLRF4APSPN20230301 | 8.1 KB | dsv_moveitcentral_service | 3/1/2023 8:24:20 AM | - | <input type="checkbox"/> <input type="checkbox"/> |
| <input type="checkbox"/> | CLRF4APPUPD20230301 | 60 KB | dsv_moveitcentral_service | 3/1/2023 8:23:14 AM | - | <input type="checkbox"/> <input type="checkbox"/> |

Identifying Applications

Texas Higher
Education
COORDINATING BOARD

Change
Password Logout

New School Certification
Inquiry

Application Query

Borrower Query

Loan Query

Disbursal Query

Loan Reporting

Login Tips

ACH Enrollment Tips

Welcome

Welcome to the Texas Higher Education Coordinating Board

NEW We are excited to announce that we have a new low-interest loan option for Texas students. The Future Occupations and Reskilling Workforce Advancement to Reach Demand (FORWARD) Loan Program is designed for students who are at least halfway to completing specific degree or certification programs within the fields of Energy, Nursing/Patient Care, Teaching, Technology, and Transportation/Logistics. To see if your program is eligible, [refer to the full list here](#). To qualify, you must be able to complete your program within two years or less.

2022 Tax Information: The Texas Higher Education Coordinating Board mailed 1098-E/1099-C tax information to the mailing address on file as of Jan. 31, 2023. The 2022 interest paid amounts are now available by accessing your online account.

If you are unable to access your account or update your demographic information online, please contact our Customer Support Center at (800) 242-3062, Monday through Friday, 8:00 a.m. to 5:00 p.m. CST.



Texas Higher Education Coordinating Board

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THECB - UAT A - 02/20/2023 6:05 PM

Application Query Search

Change Password

Logout

New School Certification Inquiry

Application Query

Borrower Query

Loan Query

Disbursal Query

Loan Reporting

Login Tips

ACH Enrollment Tips

Application Query

Application Query

Application Status Query

☒ Application Status Query

☐ Application Process Query

Application Type:

School Name:

Lender:

Application Form:

Application Status:

CommonLine Unique ID:

Records Returned Per Page:

☒ Borrower Applications

ANY

TEXAS ARMED SERVICES (ASP)

TEXAS B-ON-TIME (BOA)

TEXAS B-ON-TIME (BOH)

TEXAS B-ON-TIME (BOS)

COLLEGE ACCESS LOAN (CAL)

FORWARD LOAN - DEGREE (FWD)

FORWARD LOAN NON-DEGREE (FWN)

Any

25

Add Additional Application Type

Search

THECB

Texas Higher Education
COORDINATING BOARD

14

Application Query Search

Texas Higher Education
COORDINATING BOARD

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Application Query

Application Query

Application Status Query

Application Status Query

Application Process Query

Application Type:

Borrower Applications

FORWARD LOAN NON-DEGREE (FWN)

School Name:

Lender:

THECB (812089)

Application Form:

Any

Application Status:

Any

Any

Needs School Certification

Error Correction Needed (All)

Error Correction Needed for the 2023 Academic Year

Error Correction Needed for the 2024 Academic Year

Application Cancelled (All)

Application Cancelled by School

Application Cancelled by THECB

CommonLine Unique ID:

Records Returned Per Page:

Add Additional Application Type

Application Query Results

**Texas Higher Education
COORDINATING BOARD**

Change Password

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Application Query

Application Query

Application Status Query

3 Borrowers, 3 Applications Returned

Sort Results:

Name

Ascending

Sort

| SSN | Name | | | | | | |
|-------------|--------------------|-------------------------------|------------------|-------------------|-------------------|------------------|--------------|
| ***-**-2025 | TEST, EMMA | | | | | | |
| | Application Number | Loan Type | Requested Amount | Borrower Complete | Cosigner Complete | School Certified | Last Updated |
| | FW0001 | FORWARD LOAN NON-DEGREE (FWN) | \$8,500.00 | Y | | N | 02/14/2023 |
| ***-**-2025 | TEST, WYATT | | | | | | |
| | Application Number | Loan Type | Requested Amount | Borrower Complete | Cosigner Complete | School Certified | Last Updated |
| | FW0001 | FORWARD LOAN NON-DEGREE (FWN) | \$9,500.00 | Y | Y | N | 02/13/2023 |
| ***-**-2025 | WAZOWSKI, MIKE | | | | | | |
| | Application Number | Loan Type | Requested Amount | Borrower Complete | Cosigner Complete | School Certified | Last Updated |
| | FW0001 | FORWARD LOAN NON-DEGREE (FWN) | \$8,000.00 | Y | Y | N | 02/14/2023 |

Return To Application Query

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Borrower Query Search

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New School Certification Inquiry

- Application Query
- Borrower Query**
- Loan Query
- Disbursal Query
- Loan Reporting
- Login Tips
- ACH Enrollment Tips

Application QueryBorrower QueryBorrower Query

Borrower Query

Input a full or partial, SSN and/or last name OR Reference Number to search for results.

SSN:

Full SSN Entry (#####) OR Last 4 SSN Entry (*****)

Reference Number:

Last Name:

TEST

First Name:

EMMA

Records Returned Per Page:

25

Search

Borrower Query Results

Texas Higher Education
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Application Query

Borrower Query

Borrower Query

Borrower Query

| SSN | Name |
|-------------|------------|
| ***-**-2025 | TEST, EMMA |

Return To Borrower Query

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Borrower Summary

***-**-2025

TEST, EMMA

3 APPROVED AVE

AUSTIN, TX 78701

Reference Number: 3777743989

Home Phone: (987) 456-3210

Cell Phone: NOT ON FILE

Work Phone: NOT ON FILE

Email: THECBTESTINGSB@GMAIL.COM

Click here to start a Texas Armed Service Scholarship Program (TASSP) Application

New TASSP School Certification

Applications

Loan Applications on File

Click the + below to certify and edit certification for an existing borrower-initiated application and selecting 'Edit Certification Information'.

| Application ID | Application Type | Requested Amount | Current Status | Status Date | CommonLine Unique ID |
|---------------------|-------------------------|------------------|----------------------------------|-------------|----------------------|
| <div>+ FW0001</div> | FORWARD LOAN NON-DEGREE | \$8,500.00 | <div>Click Here for Status</div> | 02/12/2023 | 8120890003W00N042 |

Borrower Query

Borrower Detail

***-**-2025
TEST, EMMA
3 APPROVED AVE
AUSTIN, TX 78701

Reference Number: 3777743989
Home Phone: (987) 456-3210
Cell Phone: NOT ON FILE
Work Phone: NOT ON FILE
Email: THECBTESTINGSB@GMAIL.COM

Reference Number: 2777742985
Home Phone:
Cell Phone: NOT ON FILE
Work Phone: NOT ON FILE
Email:

- Application Summary for FW0001
- This is a FORWARD LOAN NON-DEGREE application.
 - The requested amount is \$8,500.00.
 - This application was made for attendance at
 - CommonLine unique identifier is 8120890003W00N042.
 - For the loan period of 1/9/2023 to 5/15/2023.

Return To Borrower Summary (EMMA TEST)

Click the + below to certify and edit certification for an existing borrower-initiated application and selecting 'Edit Certification Information'.

| Application ID | Application Type | Requested Amount | Current Status | Status Date | CommonLine Unique ID | |
|----------------|-----------------------|------------------|-----------------------|-------------|----------------------|--------------------------------|
| FW0001 | FORWARD LOAN - DEGREE | \$9,500.00 | Click Here for Status | 02/12/2023 | 8120890003W00N043 | Edit Certification Information |

Borrower Query

Texas Higher
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COORDINATING BOARD

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ACH Enrollment Tips

Borrower Query

Borrower Summary

TEST

Borrower Summary

***-**-2025

TEST, EMMA

3 APPROVED AVE

AUSTIN, TX 78701

Click here to start a Texas Armed Service
Scholarship Program (TASSP) Application

New TASSP School Certification

Applications

Loan Applications on File

Click the [+](#) below to certify and edit certification for an existing borrower-initiated application and selecting 'Edit Certification Information'.

| Application ID | Application Type | Requested Amount | Current Status | Status Date | CommonLine Unique ID | |
|----------------|-----------------------|------------------|---------------------------------------|-------------|----------------------|--|
| FW0001 | FORWARD LOAN - DEGREE | \$9,500.00 | Click Here for Status | 02/12/2023 | 8120890003W00N043 | Edit Certification Information |

Application status for
of \$9,500 (CLUID: 8120890003W00N043)

in the amount



Status: Incomplete

| Task | Completion Date | Responsibility |
|--|-----------------|----------------|
| ✓ Borrower Application Completed ? | 2/12/2023 | Borrower |
| ✓ Borrower Application Signed ? | 2/12/2023 | Borrower |
| ✓ Private Education Loan Applicant Self-Certification (BCF) Signed ? | 2/12/2023 | Borrower |
| ✓ Cosigner Application Completed ? | 2/12/2023 | Cosigner |
| ✓ Cosigner Application Signed ? | 2/12/2023 | Cosigner |
| ✓ Credit Approved ? | 2/12/2023 | 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 |

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Borrower Query

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Test

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Disbursal Query

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Borrower Query

Borrower Summary

TEST

Borrower Summary

***-**-2025

TEST, EMMA

3 APPROVED AVE

AUSTIN, TX 78701

Reference Number: 2777742985

Home Phone:

Cell Phone: NOT ON FILE

Work Phone: NOT ON FILE

Email:

Click here to start a Texas Armed Service Scholarship Program (TASSP) Application

New TASSP School Certification

Applications

Loan Applications on File

Click the below to certify and edit certification for an existing borrower-initiated application and selecting 'Edit Certification Information'.

| Application ID | Application Type | Requested Amount | Current Status | Status Date | CommonLine Unique ID | |
|----------------|-----------------------|------------------|-----------------------|-------------|----------------------|--------------------------------|
| FW0001 | FORWARD LOAN - DEGREE | \$9,500.00 | Click Here for Status | 02/12/2023 | 8120890003W00N043 | Edit Certification Information |

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School Certification

School Certification

Loan Information

| | |
|-----------------------|-----------------------|
| Application Type: | FORWARD LOAN - DEGREE |
| CommonLine Unique ID: | 8120890003W00N043 |
| Application ID: | FW0001 |
| School Code: | |
| School Information: | |

Borrower Information

Borrower Information

First Name

EMMA

Middle Initial

Last Name

TEST

Date of Birth

04/15/1991

SSN

***_**-2025

Street Address 1

3 APPROVED AVE

Street Address 2

City

AUSTIN

State

Texas

ZIP

78701 -

Eligibility Questions

Eligibility Questions

Are you a Texas resident?

☒ Yes ☐ No

Have you met satisfactory academic progress requirements set by your institution? [?](#)

☒ Yes ☐ No

Are you enrolled in a degree program or non-degree program?



☐ Degree Program ☒ Non-Degree Program

Degree program is an academic associate degree or higher. Non-degree program is a non-credited certification where the program's duration must be less than two years.

Have you completed at least 50% of the required coursework prior to receiving a loan through the degree program? [?](#)

☒ Yes ☐ No

Are you enrolled in a master's degree program? [?](#)

☒ Yes ☐ No

Is the program part of a combined baccalaureate-master's program? [?](#)

☒ Yes ☐ No

Program of Study

Programs of Study

Programs of Study are predetermined courses that prepare students with the knowledge and skills necessary for success in their chosen career. The THECB determines eligible Programs of Study which focus on students who are completing high-value/high-demand credentials throughout the State of Texas.

Refine Program Category and Subcategory Dropdown Lists (Optional)

If you would like to refine the program category and subcategory dropdown lists; you may enter in a program of study keyword or CIP code and then click the "Refine" button. If the results do not help you make a selection; click the "Clear" button to return to the full program category and subcategory dropdown lists.

Program Category (Select One)




Energy
Nursing/Patient Care
Teaching
Technology
Transportation/Logistics

Program Subcategory

51.3815 - Occupational and Environmental Health Nursing

If your "Program Category" or "Program Subcategory" are not listed, return to Apply Online\Continue App to consider applying for a College Access Loan or contact the institution you plan to attend to determine next steps.

Enrollment Information

| Enrollment Information | |
|-----------------------------|--|
| Academic loan period | 08/22/2022  28 to 05/15/2023  28 |
| Anticipated Graduation Date | 12/15/2023  28 |

| Financial Aid Information | |
|---------------------------|-------|
| Requested Loan Amount | 9500 |
| Cost of Attendance | 25000 |
| Estimated Financial Aid | 20000 |
| Certified Loan Amount | 5000 |

Disbursement Information


Disbursal Information

Number of Disbursals

2

Disbursal 1 Date

03/01/2023


28

Disbursal 1 Amount

2500

Disbursal 2 Date


04/01/2023

28

Disbursal 2 Amount


2500

Disbursal 3 Date

28

Disbursal 3 Amount

Disbursal 4 Date

28

Disbursal 4 Amount

Certification

Certification

I have applied or cause to have applied the rules of the FORWARD Loan and the Hinson-Hazlewood College Student Loan Programs and certify the following, to the best of my knowledge:

1. The borrower named on this application is an eligible student in accordance with the rules of the FORWARD Loan and the Hinson-Hazlewood College Student Loan Programs,
2. The borrower is not incarcerated,
3. The borrower is eligible for a loan in the amount certified,
4. The disbursement schedule complies with the requirements of the FORWARD Loan and the Hinson-Hazlewood College Student Loan Programs,
5. Based on records available and inquiry made, the borrower is not liable for an overpayment on any state or federal grant,
6. The information provided is true, complete, and accurate,
7. The borrower's request for the loan can be evidenced in our Financial Aid Office by the borrower's active OR passive confirmation of our offer of the proposed loan amount.

The amount of this loan may not exceed the difference between the cost of attendance and other forms of student assistance for which the student may be eligible. Other sources of student assistance include gifts, grants, scholarships, federal Perkins loans (to the extent that your institution has available Perkins funds), and Stafford loans (subsidized and unsubsidized), but not federal PLUS loans.

- ☐ Not Eligible to Certify
- ☒ Certify

The application has been certified.

Submit

Application Checklist

Application status for _____ in the amount _____ ✖
of \$9,500 (CLUID: 8120890003W00N043)

Status: Incomplete

| Task | Completion Date | Responsibility |
|--|-----------------|----------------|
| ✓ Borrower Application Completed ? | 2/12/2023 | Borrower |
| ✓ Borrower Application Signed ? | 2/12/2023 | Borrower |
| ✓ Private Education Loan Applicant Self-Certification (BCF) Signed ? | 2/12/2023 | Borrower |
| ✓ Cosigner Application Completed ? | 2/12/2023 | Cosigner |
| ✓ Cosigner Application Signed ? | 2/12/2023 | Cosigner |
| ✓ Credit Approved ? | 2/12/2023 | Lender |
| — Lender Approval Completed ? | | Lender |
| ✓ School Certification Completed ? | 2/28/2023 | 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 |



THECB completes manageable debt calculation to determine final eligibility. Depending on the calculation, the loan could be reduced or canceled by the THECB.

Eligibility Questions – Not Eligible

Eligibility Questions

Are you a Texas resident?

☐ Yes ☒ No

You must be a Texas resident to apply for a FORWARD loan through the THECB.

Have you met satisfactory academic progress requirements set by your institution? [?](#)

☒ Yes ☐ No

Are you enrolled in a degree program or non-degree program? [?](#)

☐ Degree Program ☒ Non-Degree Program

Is the program duration you are enrolled in less than two years? [?](#)

☒ Yes ☐ No

The current answers to the eligibility questions has determined that the borrower is not eligible for a FORWARD loan. Please scroll to the Certification section, select "Not Eligible to Certify" and click Submit.

Not Eligible to Certify

Certification

I have applied or cause to have applied the rules of the FORWARD Loan and the Hinson-Hazlewood College Student Loan Programs and certify the following, to the best of my knowledge:

1. The borrower named on this application is an eligible student in accordance with the rules of the FORWARD Loan and the Hinson-Hazlewood College Student Loan Programs,
2. The borrower is not incarcerated,
3. The borrower is eligible for a loan in the amount certified,
4. The disbursement schedule complies with the requirements of the FORWARD Loan and the Hinson-Hazlewood College Student Loan Programs,
5. Based on records available and inquiry made, the borrower is not liable for an overpayment on any state or federal grant,
6. The information provided is true, complete, and accurate,

The borrower's request for the loan can be evidenced in our Financial Aid Office by the borrower's active OR passive confirmation of our offer of the proposed loan amount.

The amount of this loan may not exceed the difference between the cost of attendance and other forms of student assistance for which the student may be eligible. Other sources of student assistance include gifts, grants, scholarships, federal Perkins loans (to the extent that your institution has available Perkins funds), and Stafford loans (subsidized and unsubsidized), but not federal PLUS loans.

☒ Not Eligible to Certify

☐ Certify

The application has been cancelled.

Submit

Not Eligible to Certify

Application status for _____ in the amount _____ ✖
of \$9,500 (CLUID: 8120890003W00N044)

Status: Canceled

| Task | Completion Date | Responsibility |
|--|-----------------|----------------|
| ✓ Borrower Application Completed ? | 2/12/2023 | Borrower |
| ✓ Borrower Application Signed ? | 2/12/2023 | Borrower |
| ✓ Private Education Loan Applicant Self-Certification (BCF) Signed ? | 2/12/2023 | Borrower |
| ✓ Cosigner Application Completed ? | 2/12/2023 | Cosigner |
| ✓ Cosigner Application Signed ? | 2/12/2023 | Cosigner |
| ✓ Credit Approved ? | 2/12/2023 | 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 |

Financial Aid Database (FAD)

Database Submission Portal

FAD Report Manual

- Manual released 1/26/23

Data elements (114-118) were added, which are marked "New" in the manual and are required for cycle 2:

- 114 - Texas First Scholarship
- 115 - Bilingual Education
- 116 - Educational Aide Exemption
- 117 - Educational Aide Exemption Match
- 118 - FORWARD Loan Program

- **Modified** version...coming soon!



Texas Higher
Education
COORDINATING BOARD

Financial Aid Database (FAD)
Report Manual
(FY 2023) 2022-2023

CONTACT:
FADB@highered.texas.gov

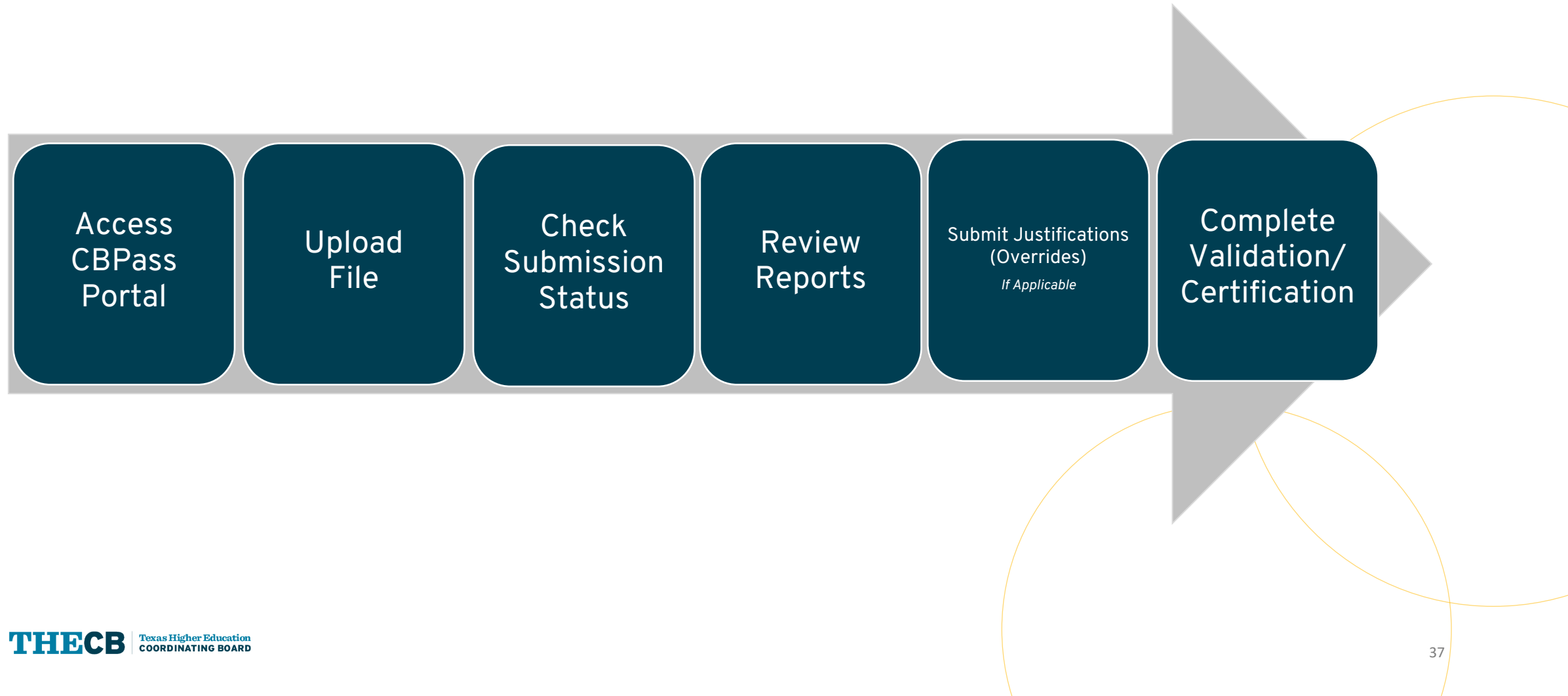
FAD Processing Dates

To ensure FAD files are validated/certified in a timely manner, institutions will be required to submit an initial FAD file by the deadline listed below (excluding Cycle One). Updates are being made to the FY 2023 FAD Manual to account for these changes.

Reporting Cycle Dates^{Revised}

| Reporting Cycle | First Day to Submit | Deadline to Submit Initial FAD File* | Deadline to Validate or Certify FAD file | Submission Requirements |
|-----------------|---------------------|--------------------------------------|--|--|
| First | March 9, 2023 | N/A | April 17, 2023 | Deadline to validate student data. |
| Second | June 7, 2023 | June 23, 2023 | Aug. 14, 2023 | Deadline to validate student data. |
| Third | Sept. 20, 2023 | Oct. 13, 2023 | Nov. 13, 2023 | Deadline to reconcile state program totals and certify student data. |

Data Submission Portal Flow



Access Portal

CBPass



Accessing the Portal



Access the Data Submission Portal

New Users – Create Account

CBPass Login

Sign in with your CBPass Account

*Username:

*Password:

[Forgot your Username or Password?](#)

don't have an account? [create one now!](#)

Access the Data Submission Portal

New Users – Create Account

CBPass - New User Registration

To create a CBPass account, enter the information below, then click on the *Register* button. Once you have registered you will be able to request access to applications.

All fields are required.

Note: Nominators for the Texas Armed Services Scholarship Program (TASSP) enter the office of the elected official you are affiliated with.

- You must begin by first typing the title - Representative, Senator, Governor or Lieutenant - then from the drop-down menu select your official's name.

Account Information

*First Name [required]:

Middle Initial:

*Last Name [required]:

*Begin typing to enter/modify your affiliation or type "Other" [required]:
Affiliated with an elected official? Begin typing the title ("Senator," "Representative," "Governor," "Lieutenant"), then select from the drop-down.

*Physical Address [required]:
 -

*Telephone Number [required]: () - -

*E-Mail Address [required]:

*Re-Type E-Mail Address [required]:

*User Name [required]: (Used for login)

*Password [required]:
Passwords must be at least eight (8) characters and contain at least 3 of the 4 following attributes: uppercase letter, lowercase letter, number, special character.

Password Strength: Strong

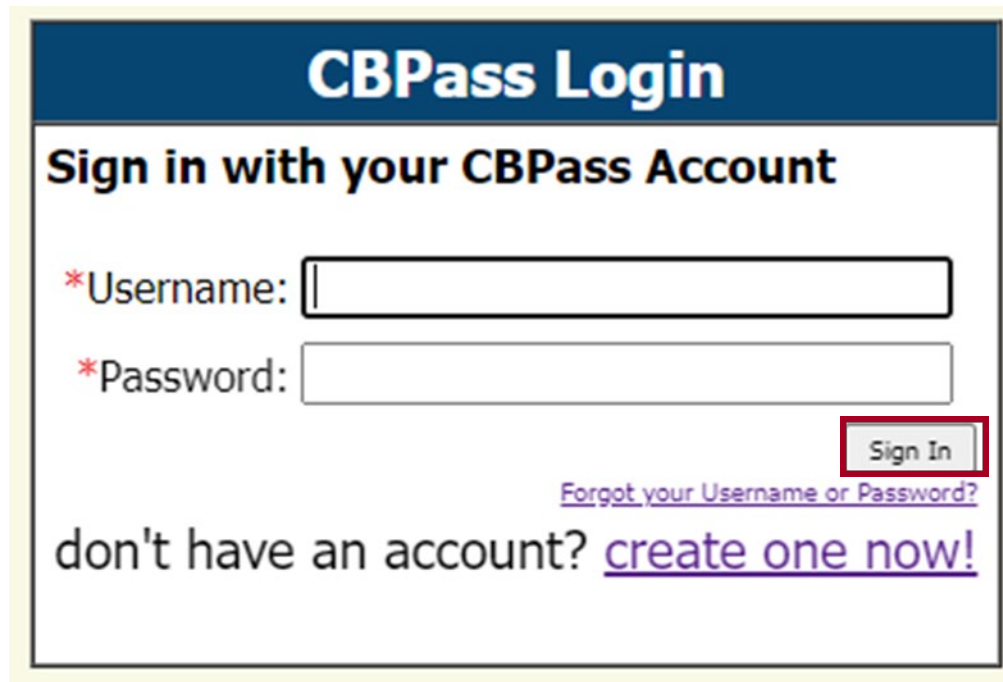
*Re-Type New Password [required]:

*Enter the answer to the math problem [required]:

☒ [required] I agree to the [CBPass Account Agreement](#) (link opens in a new window)

Access the Data Submission Portal

All Users - Request Access

A screenshot of a web form titled "CBPass Login". The form has a dark blue header with the title in white. Below the header, it says "Sign in with your CBPass Account". There are two input fields: one for "Username" and one for "Password", both preceded by a red asterisk. To the right of the password field is a "Sign In" button with a red border. Below the button is a link that says "Forgot your Username or Password?". At the bottom, it says "don't have an account? [create one now!](#)".

CBPass Login

Sign in with your CBPass Account

*Username:

*Password:

[Sign In](#)

[Forgot your Username or Password?](#)

don't have an account? [create one now!](#)

Access the Data Submission Portal

All Users - Request Access

The image displays two overlapping screenshots of the CBBPass web application. The left screenshot shows the 'MY ACCESS' tab with a link 'Click to Request Access to another application' highlighted by a red box. A red arrow points from this link to the 'Request Access' section of the right screenshot. The right screenshot shows the 'Request Access' section with a dropdown menu open, listing various applications. The 'Data Submission Portal' is highlighted in the list. The interface includes a header with 'CBBPass Welcome' and navigation links, and a sidebar with 'MY ACCESS' and 'PROFILE' tabs.

Left Screenshot (MY ACCESS tab):

- Header: CBBPass Welcome (Main Menu) (Logout)
- Navigation: MY ACCESS, PROFILE
- Text: Search for and view your current applications or request access to additional applications.
- Link: [Click to Request Access to another application](#)
- Filters: App ID: App Status: All

Right Screenshot (Request Access section):

- Header: CBBPass Welcome Tester (Main Menu) (Logout)
- Navigation: MY ACCESS, PROFILE
- Text: Search for and view your current applications or request access to additional applications.
- Instructions: [Instructions](#)
- Section: Request Access
- Select Application: *Online TASFA Azure
- Request Access:
 - *Online TASFA Azure
 - AAR Graduate Program Review
 - Academic Course Guide Manual
 - Accountability
 - Accountability Institution Portal
 - Accountability_OLD
 - Business Management System
 - Certificate of Authorization Institution Portal
 - Community College Annual Reporting and Analysis Tool
 - Data Submission Portal**
 - Developer Tools
 - Distance Education Portal
 - EDC Portal
 - Family Medicine Resident Roster Load
 - Financial Aid Data Certification
 - Fraudulent Institutions
 - Good Neighbor Program
 - Grant Payment
 - Integrated Fiscal Reporting System
 - Intellectual and Developmental Disabilities Inventory

Access the Data Submission Portal

All Users - Request Access

MY ACCESS

PROFILE

Search for and view your current applications or request access to additional applications.

✓

Thank you for your request. It is in the process of implementation. You will be receiving an e-mail soon with further information.

Instructions ?

[Click to Request Access to another application](#)

Filters

App ID:

App Name:

All

Owner:

App Status:

All

Access Status:

All

Role:

All

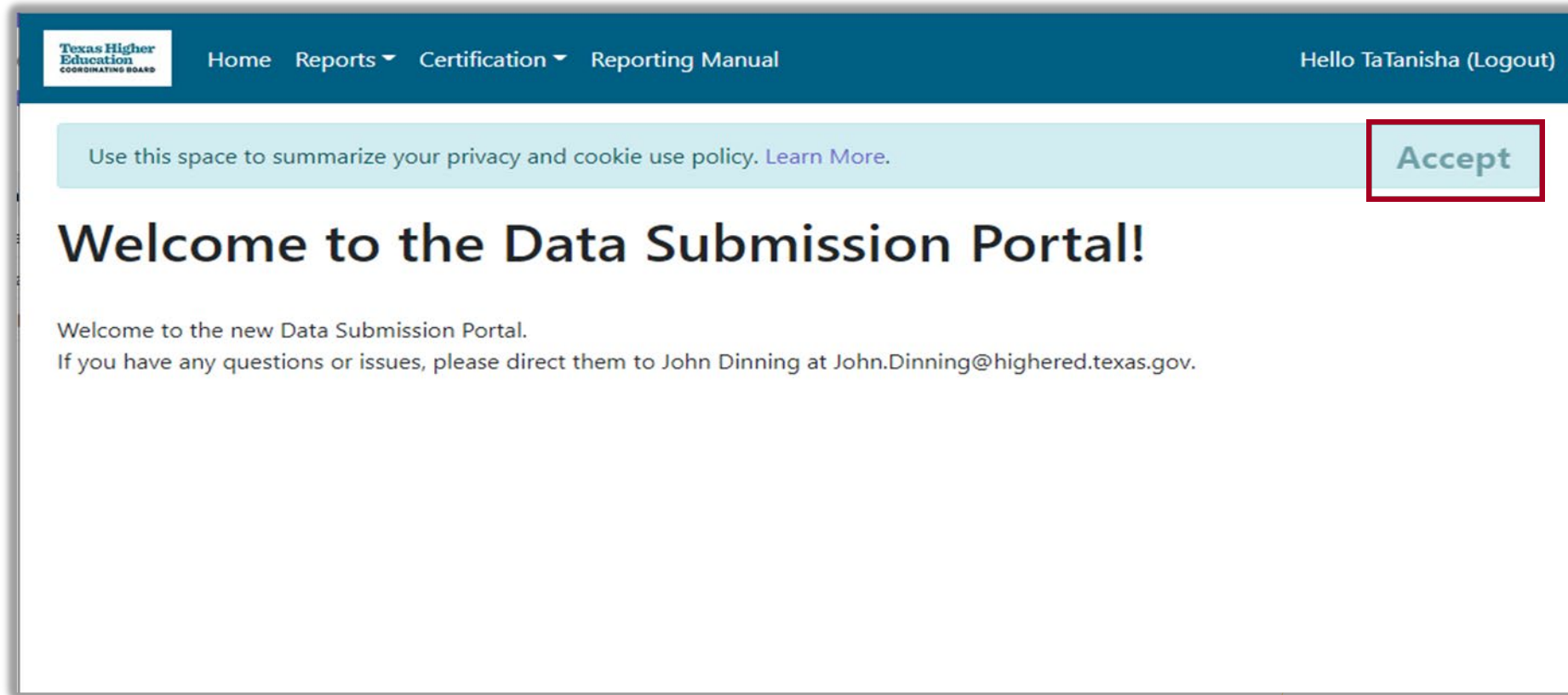
Run

Clear Filters

Record Count= 1

| App ID | Application Name | Owner(s) | Delegate(s)/Admin | Role | App Status | Access Status | |
|--------|--|---|-------------------|--------|------------|---------------|-------------------------------|
| 147 | Data Submission Portal | Kishore.Mattapalli@highered.texas.gov, Pavani.Parsi@highered.texas.gov, DeCha.Reid@highered.texas.gov | | CBUser | Active | Approved | Remove Access |

Access the Data Submission Portal

A screenshot of the Texas Higher Education Coordinating Board's Data Submission Portal. The interface features a dark blue header with the THECB logo on the left and navigation links (Home, Reports, Certification, Reporting Manual) in the center. On the right of the header, it says "Hello TaTanisha (Logout)". Below the header is a light blue banner with a privacy policy notice and a red-bordered "Accept" button. The main content area has a large heading "Welcome to the Data Submission Portal!" followed by a welcome message and contact information for John Dinning.

Texas Higher Education
COORDINATING BOARD

Home Reports ▾ Certification ▾ Reporting Manual

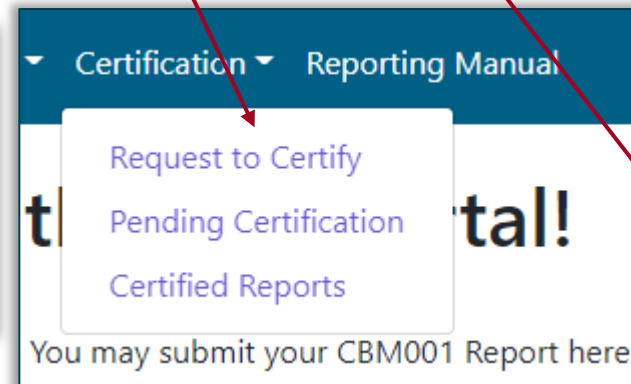
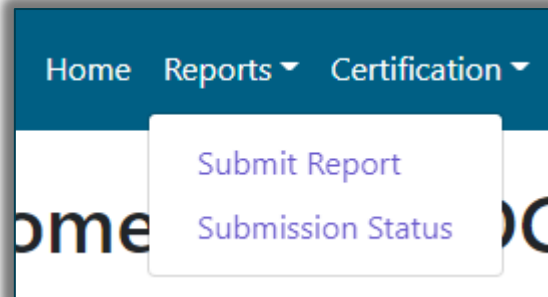
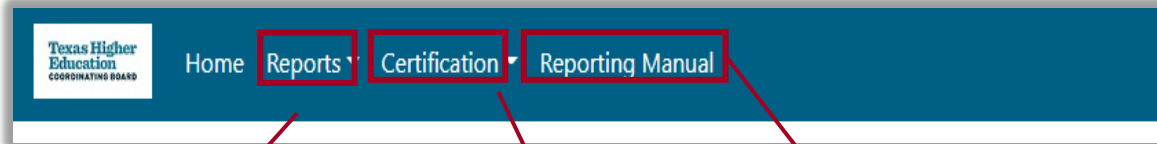
Hello TaTanisha (Logout)

Use this space to summarize your privacy and cookie use policy. [Learn More.](#) **Accept**

Welcome to the Data Submission Portal!

Welcome to the new Data Submission Portal.
If you have any questions or issues, please direct them to John Dinning at John.Dinning@highered.texas.gov.

Portal Toolbar



CBM Reporting Manuals

Reporting manuals, appendices and other resources for submitting institution and student-level data to the Texas Higher Education Coordinating Board.

Reporting and Procedures Manuals

- Career Schools and Colleges and Private and Out-of-State Public Postsecondary Institutions ([PDF](#))
- Community, Technical and State Colleges ([PDF](#))
- Health-Related Institutions ([PDF](#))
- Independent Colleges and Universities ([PDF](#))
- Public Universities ([PDF](#))

CBM Reporting Manuals for Spring 2021

- Community, Technical and State Colleges ([PDF](#))
- Public Universities ([PDF](#))

CBM Reporting Manual Supplements for Spring 2022

- Community, Technical and State Colleges ([PDF](#))
- Public Universities ([PDF](#))

Appendices to the CBM Reporting Manuals

- Appendix A-J and N-P - FICE Codes, Residence Codes, CIP Codes, Administrative Unit Codes, Facilities Codes, GME Formula Funding and Space Model Funding, Reference Tables ([PDF](#))
- Appendix K - ACGME and AOA Residency Programs in Texas ([XLS](#))
- Appendix L - Medical Schools ([XLS](#))
- Appendix M - Texas CEEB Codes ([XLS](#))
- Appendix Q - Guidelines for Reporting First College-Level Courses ([PDF](#))

Recommended Course Sequence

- [Recommended Course Sequence Reporting](#)

Financial Aid Database System (FADS)

- FY 2022 FAD Comprehensive Reporting Manual ([PDF](#))
- FY 2021 FAD Comprehensive Reporting Manual ([PDF](#))

Upload File

Data Submission Portal

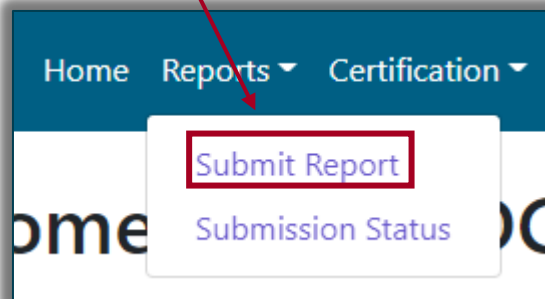
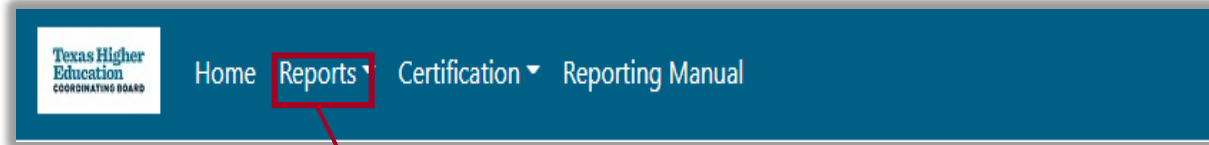


Submitting a Report

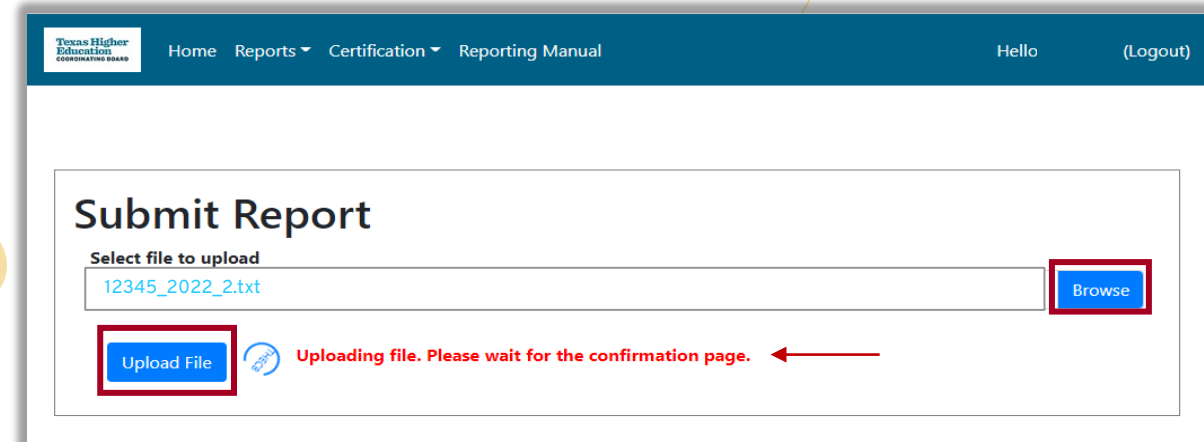
Submitting A Report



1




2






Real-Time Upload Messages

Successful Upload


 Home Reports ▾ Certification ▾ Reporting Manual

Thank you! Your file has been received and is processing. You may view your submission on the Submission Status page.

Upload Errors

 Home Reports ▾ Certification ▾ Reporting Manual

The file cannot be processed - Invalid Record Code (File Label Id)

 Home Reports ▾ Certification ▾ Reporting Manual

The file cannot be processed - Invalid Fice Code



Submission Status

Texas Higher Education
COORDINATING BOARD

Home Reports Certification Reporting Manual

Hello (Logout)

Submit Report

Submission Status

Submission Status

Report Type

Select All

Reporting Year

Select All

Reporting Period

Select All

Start Date

07/19/2022

End Date

08/18/2022

Get Submission Status

Submission Status

Show 10 entries

Search:

| View Report | Input File | FICE | Type | Year | Period | Submitter Email | Date Submitted | Status |
|-------------|------------|--------|--------|------|---------|---------------------|---------------------|------------|
| 297793 | Download | 012015 | FAD001 | 2022 | Cycle 2 | thecbtest@yahoo.com | 08/18/2022 03:03 PM | Processing |

Review/Download Reports

Data Submission Portal




Review Reports



Viewing Reports

- *Edit Report (ECR)- Includes the following:*
 - **Edit Summary**
 - **Error Report**
 - **Warning/Questionable Report**
- *Reconciliation Report (Recon)*
- *Program Comparison Report (PCR)*
- *Unmatched SSN Report (SSN) - Cycle 3 Only*

 Home Reports ▾ Certification ▾ Reporting Manual

Helic (Logout)

Submission Status

Report Type Reporting Year Reporting Period Start Date End Date [Get Submission Status](#)

Submission Status

Show entries Search:

| View Report | Input File | FICE | Type | Year | Period | Submitter Email | Date Submitted | Status |
|--|--------------------------|--------|--------|------|---------|----------------------|---------------------|---------------------------|
| 391928 ECR Recon PCR | Download | 003543 | FAD001 | 2022 | Cycle 2 | prod003543@gmail.com | 01/18/2023 01:22 PM | Submitted |
| 391925 ECR Recon PCR | Download | 003543 | FAD001 | 2022 | Cycle 2 | prod003543@gmail.com | 01/18/2023 09:43 AM | Submitted |

Showing 1 to 4 of 4 entries Previous Next



Report Download Options

Texas Higher Education Coordinating Board

Home Reports Certification Reporting Manual

Submission Status

Report Type Select All Reporting Year Select All Report

Show 10 entries

| | View Report | Input File | FIC |
|-----------------------------|-------------|------------|-----|
| 391928 ECR Recon PCR | Download | 003 | |
| 391925 ECR Recon PCR | Download | 003 | |

Showing 1 to 4 of 4 entries

File View Export 1 of 2 Print now

TEXAS HIGHER EDUCATION COORDINATING BOARD

Reconciliation Report

Austin Community College

Microsoft Excel (.xlsx)

PDF (.pdf)

Accessible PDF (.pdf)

Microsoft PowerPoint (.pptx)

| Item Number | Item Description | THECB Count of Students | THECB Amount Reported | Institution Count of Students | Institution Amount Reported |
|-------------|---------------------------------------|-------------------------|-----------------------|-------------------------------|-----------------------------|
| 10 | Exempt Waiv Award 1 | N/A | N/A | 1,127 | 2,558,937 |
| 13 | Exempt Waiv Award 2 | N/A | N/A | 0 | 0 |
| 16 | Exempt Waiv Award 3 | N/A | N/A | 0 | 0 |
| 19 | Exempt Waiv Award 4 | N/A | N/A | 0 | 0 |
| 48 | Tuit Exempt Waiv | N/A | N/A | 0 | 0 |
| 49 | Categorical Aid | N/A | N/A | 322 | 604,677 |
| 50 | Federal Pell | N/A | N/A | 9,603 | 30,304,963 |
| 51 | Federal SEOG | N/A | N/A | 2,405 | 1,603,548 |
| 52 | TPEG | N/A | N/A | 2,500 | 2,514,944 |
| 53 | Tuition Differential | N/A | N/A | 0 | 0 |
| 54 | TEG State and GEER Total | 0 | 0 | 0 | 0 |
| | TEG State Appropriation | N/A | N/A | N/A | N/A |
| | TEG GEER | N/A | N/A | N/A | N/A |
| 60 | HB3015 Grants and Scholarships | N/A | N/A | 0 | 0 |
| 61 | Restricted Grants and Scholarships | N/A | N/A | 535 | 765,925 |
| 62 | Unrestricted Grants and Scholarships | N/A | N/A | 251 | 389,547 |
| 63 | Federal VA Benefits | N/A | N/A | 1,208 | 2,991,884 |
| 64 | Athletic Grants and Scholarships | N/A | N/A | 0 | 0 |
| 65 | Student Deposit Scholarships | N/A | N/A | 0 | 0 |
| 66 | Other Federal Grants and Scholarships | N/A | N/A | 0 | 0 |
| 67 | Other State Grants and Scholarships | N/A | N/A | 0 | 0 |

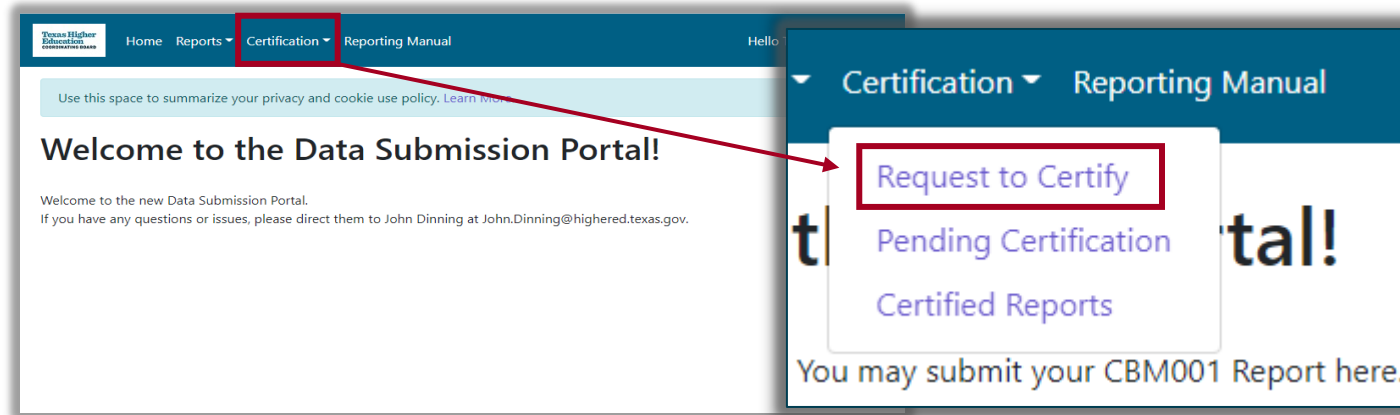
Submit Justifications

Data Submission Portal

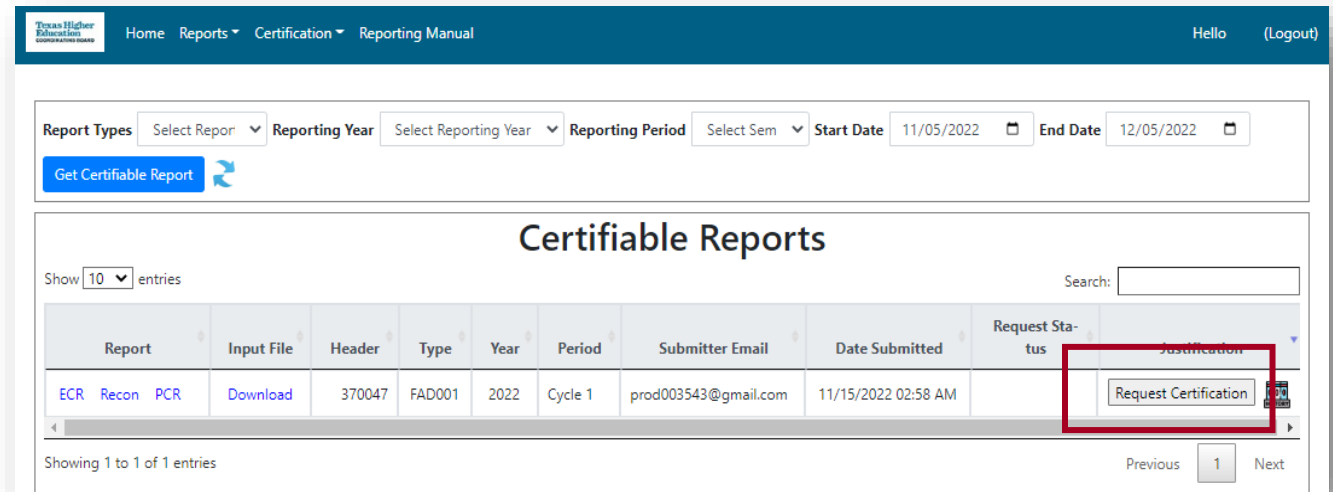


Justifications

Justification (Override) Process



The justifications feature in the submission portal allows institutions to send override explanations for **all report errors simultaneously** without sending individual emails. Any errors that **do not** require a justification (override) must first be cleared in the file.



Justifications



Texas Higher Education
COMPLETION STATUS

[Home](#) [Reports](#) [Certification](#) [Reporting Manual](#)

Hello .logout

Use this space to summarize your privacy and cookie use policy. [Learn More.](#) [Accept](#)

Certification request for FAD001 - 2022 Cycle 2

[Error Item Justifications](#)

| Item Name | Rule ID | Rule Message | Number of Students | Justification |
|------------------|------------|--|--------------------|---|
| LastName | FAD001-134 | no special characters | 551 | <div>null</div> <div>Maximum allowed 2000 characters only</div> |
| FirstName | FAD001-136 | no special characters | 80 | <div>null</div> <div>Maximum allowed 2000 characters only</div> |
| EnrollmentStatus | FAD001-145 | =1 and classification (#33) = 1 or 5 and attempted hours for Fall (#99) or Spring (#100) or Summer (#101) semester < 12 and exception code <> 05, 15 | 4417 | <div>null</div> <div>Maximum allowed 2000 characters only</div> |
| EnrollmentStatus | FAD001-146 | =2 and classification (#33) = 1 or 5 and attempted hours for | 4631 | <div>null</div> |



Justifications continued

Use the *optional* **Other Justifications** box to provide further comments on the justifications submitted.

Other Justifications:

This is an example

Maximum allowed 2000 characters only

The *optional* **Browse** button allows the institution to upload supporting documentation needed for the justification process.

Select file to upload

select file

Browse

Cancel



Justifications continued

At any time, users can save their work on this page by clicking Save as Draft at the bottom of the page.

When all justifications are complete, click Request to Validate/Certify to be directed to the validation page.

Save as Draft Request to Validate \ Certify

Date: 23-08-2022 FICE Code: 012015 Institution: Austin Community College

VALIDATION

By submitting this form, you are confirming the information provided to you in the latest edit report is accurate. When you complete the validation form and click submit, we will consider it to be your confirmation of the data and you will have met your reporting requirements for the first/second cycle.

NOTE: If any data during the first and/or second cycle is found to be incorrect after you have submitted your validation, you will be unable to resubmit your database report. Corrections should be made to the data in the following cycle. During the third cycle, all data must be corrected and accurate to be certified.

Validating Name: Title:

Email: Phone:

☐ I hereby confirm that the student-by-student data provided to the Coordinating Board is valid and all items marked as "Review" accurately reflect the activities in our office for the academic year.

[Close](#) [Reset](#) [Submit](#)

Your request for the following report - FICE Code: 003632 and Report Type: FAD001 - Report Year: 2022 - Cycle 2 has been submitted for certification

[Back to Results](#)

Validating/Certifying Reports

Data Submission Portal



Certifying Reports



Validating/Certifying

Texas Higher Education Data Submission Portal

Home Reports **Certification** Reporting Manual Hello (Logout)

Welcome to the Data Submission Portal!

Welcome to the new Data Submission Portal.
If you have any questions or issues, please direct them to John Dinning at John.Dinning@highered.texas.gov.

Certification Reporting Manual

Request to Certify

Pending Certification

Certified Reports

The institution will receive an email notification once the file is error-free and the validation/certification process can be started in CBPass.

Date: 23-08-2022 FICE Code: 012015 Institution: Austin Community College

VALIDATION

By submitting this form, you are confirming the information provided to you in the latest edit report is accurate. When you complete the validation form and click submit, we will consider it to be your confirmation of the data and you will have met your reporting requirements for the first/second cycle.

NOTE: If any data during the first and/or second cycle is found to be incorrect after you have submitted your validation, you will be unable to resubmit your database report. Corrections should be made to the data in the following cycle. During the third cycle, all data must be corrected and accurate to be certified.

Validating Name Title

thecbtest@yahoo.com (xxx) xxx xxxx

Email Phone

☐ I hereby confirm that the student-by-student data provided to the Coordinating Board is valid and all items marked as "Review" accurately reflect the activities in our office for the academic year.

Close Reset Submit

Your request for the following report - FICE Code: 003632 and Report Type: FAD001 - Report Year: 2022 - Cycle 2 has been submitted for certification

Back to Results

Notifications and Deadlines

Notifications and Deadlines

Recent Notifications

- TEXAS Grant and TEOG Award Amounts – Jan. 19
- FORWARD Guidelines – Feb. 24

Upcoming Notifications

- Updated Spring Institutional Calendar
- Authority to Transfer
- TEG Award Amounts

Deadlines

- Transfer Grant – Reimbursement Request Spring 2023 – Feb 28 (target date)
- Opt In/Out (EAE, TCWS, WSMP) – March 3
- Good Neighbor Program – March 15
- TEG Engagement Report FY 2022 – April 15

Contact Student Financial Aid Programs

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

Borrower Services

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

Texas Financial Aid Information Center

- Public Line: (888) 311-8881

Contact Financial Aid Services in one of the following ways:

FAS Institutional Phone Line

- Institutions Only: (844) 792-2640

Submit inquiries online through the CONTACT US web form.



**Phone Line
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.
- Describe your inquiry in 4000 characters or less.

Provide the best **direct phone number** to reach you.

Texas Higher Education Coordinating Board

Contact Us

An asterisk * by the field indicates a required field!

Received From*

INSTITUTION

Institution

Contact Reason*

*Financial Aid Question

Description*

4000 characters max

Please do NOT include your full Social Security Number inside the issue description. If you have a question about the status of a new loan application, accounts in repayment, or deferments, please use the last four digits of your SSN instead.

Is this a complaint

No ☒ Yes ☐

Contact Preference

E-MAIL ☒ LETTER ☐ PHONE ☐

Salutation*

Dr.

First Name*

Last Name*

E-mail*

Phone (10-digit)

Phone Ext

Mail Address

Mail Address2

Mail Address3

City

State

-- please select State --

Zip Code (5-digit)

Submit

|

[Help](#)



Texas Higher Education

COORDINATING BOARD

Questions?