State Financial Aid Webcast

Leah Smalley and Michelle Fairbanks
Student Financial Aid Programs
April 13, 2021

Topics of Discussion

- Legislative Session Overview
- TASFA: Annual Feedback & eTASFA
- Frequently Asked Topics
- Deadline Reminders and Training

87th Legislative Session

Legislative Session Summary

- The 87th session is 140 days.
- The session is approx. 40% complete.
- The final day legislators could file bills was March 12.
- More than 6,600 bills were filed.
- Fewer than 20% typically make it to the Governor's desk.
- THECB is tracking 480+ bills.

Student Financial Aid Programs has analyzed approximately 63 bills…

Legislative Session Overview

Featured Bills

- HB 2827 (Gonzalez, M.) – OnCourse Replacement
- HB 4387 (Gonzalez, M.) – TEXAS Grant Pilot Program
- SB 1237 (Zaffirini) – TEXAS Grant/TEOG Alternative FA Plans
- HB 3273 (Neave)/SB 1860 (Powell) – Electronic TASFA Extension
- HB 3348 (Pacheco)/SB 1300 (Creighton) – Community College Baccalaureate Degree

Legislative Session Resources

Texas Legislature Online

Look up specific bills:
https://capitol.texas.gov/BillLookup/BillNumber.aspx

Sign up for Alerts:
https://capitol.texas.gov/MyTLO/Login/Login.aspx?ReturnUrl=%2fMyTLO%2fAlerts%2fBills.aspx

Financial Aid Advisory Committee (FAAC)

Meeting Broadcast – March 4, 2021:
https://www.youtube.com/watch?v=eYzdC0IMlZ4&feature=youtu.be
(Forward video approximately 37 minutes to listen)

Texas Tribune

https://www.texastribune.org/topics/87th-legislative-session/?page=1

Higher Education Policy & Appropriations - 87th Legislature

- House Higher Education Committee Presentation by Commissioner Harrison Keller [PDF] (March 4, 2021)
- House Appropriations Subcommittee on Article III Presentation by Commissioner Harrison Keller [PDF] (March 3, 2021)
- Senate Finance Committee Presentation by Commissioner Harrison Keller [PDF] (February 23, 2021)
- House Appropriations Committee Presentation by Commissioner Harrison Keller [PDF] (February 23, 2021)

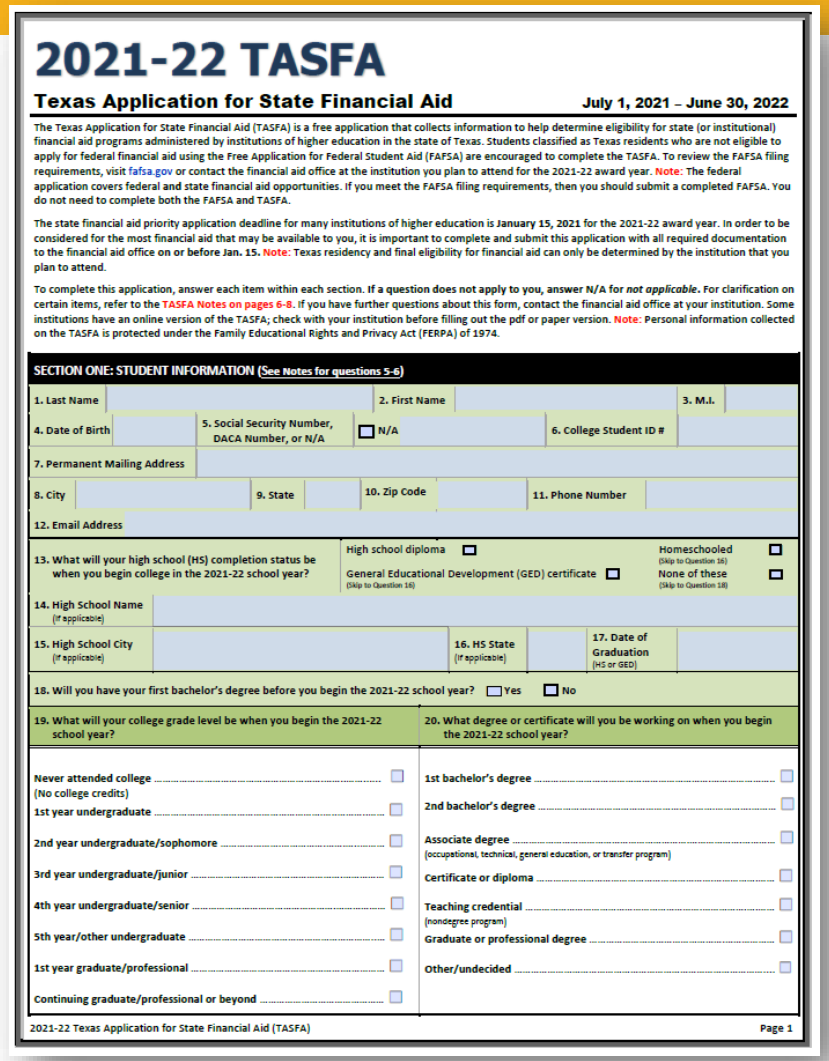
Texas Application for State Financial Aid (TASFA)

Paper TASFA Form Recommendations

- The FAAC TASFA Sub-Committee is seeking feedback for improving the 2022-23 TASFA paper form.
- To provide suggestions:

  Click CONTACT US → select "Financial Aid Question" in the drop-down menu.

Deadline: April 30, 2021



2021-22 TASFA

Texas Application for State Financial Aid July 1, 2021 – June 30, 2022

The Texas Application for State Financial Aid (TASFA) is a free application that collects information to help determine eligibility for state (or institutional) financial aid programs administered by institutions of higher education in the state of Texas. Students classified as Texas residents who are not eligible to apply for federal financial aid using the Free Application for Federal Student Aid (FAFSA) are encouraged to complete the TASFA. To review the FAFSA filing requirements, visit fafsa.gov or contact the financial aid office at the institution you plan to attend for the 2021-22 award year. Note: The federal application covers federal and state financial aid opportunities. If you meet the FAFSA filing requirements, then you should submit a completed FAFSA. You do not need to complete both the FAFSA and TASFA.

The state financial aid priority application deadline for many institutions of higher education is **January 15, 2021** for the 2021-22 award year. In order to be considered for the most financial aid that may be available to you, it is important to complete and submit this application with all required documentation to the financial aid office on or before **Jan. 15.** Note: Texas residency and final eligibility for financial aid can only be determined by the institution that you plan to attend.

To complete this application, answer each item within each section. **If a question does not apply to you, answer N/A for *not applicable*.** For clarification on certain items, refer to the TASFA Notes on pages 6-8. If you have further questions about this form, contact the financial aid office at your institution. Some institutions have an online version of the TASFA; check with your institution before filling out the pdf or paper version. Note: Personal information collected on the TASFA is protected under the Family Educational Rights and Privacy Act (FERPA) of 1974.

SECTION ONE: STUDENT INFORMATION (See Notes for questions 5-6)

1. Last Name | 2. First Name | 3. M.I.
4. Date of Birth | 5. Social Security Number, DACA Number, or N/A ☐ N/A | 6. College Student ID #
7. Permanent Mailing Address
8. City | 9. State | 10. Zip Code | 11. Phone Number
12. Email Address

13. What will your high school (HS) completion status be when you begin college in the 2021-22 school year? ☐ High school diploma ☐ General Educational Development (GED) certificate (Skip to Question 16) ☐ Homeschooled (Skip to Question 16) ☐ None of these (Skip to Question 18)
14. High School Name (If applicable)
15. High School City (If applicable) | 16. HS State (If applicable) | 17. Date of Graduation (HS or GED)
18. Will you have your first bachelor's degree before you begin the 2021-22 school year? ☐ Yes ☐ No

19. What will your college grade level be when you begin the 2021-22 school year?	20. What degree or certificate will you be working on when you begin the 2021-22 school year?
☐ Never attended college (No college credits)	☐ 1st bachelor's degree
☐ 1st year undergraduate	☐ 2nd bachelor's degree
☐ 2nd year undergraduate/sophomore	☐ Associate degree (occupational, technical, general education, or transfer program)
☐ 3rd year undergraduate/junior	☐ Certificate or diploma
☐ 4th year undergraduate/senior	☐ Teaching credential (nondegree program)
☐ 5th year/other undergraduate	☐ Graduate or professional degree
☐ 1st year graduate/professional	☐ Other/undecided
☐ Continuing graduate/professional or beyond	

2021-22 Texas Application for State Financial Aid (TASFA) Page 1

Overview eTASFA

HB 2140 in the 86th legislative session was passed into law under Texas Education Code, 61.07762, which:

- Established the Texas Application for State Financial Aid (TASFA) electronically through the ApplyTexas system.
- Established an advisory committee of financial aid personnel and other stakeholders.
- Required Board adopt procedures for TASFA and develop recommendations. Requires Board submit report on recommendations to Legislature by January 1, 2021.
- Electronic TASFA available for applications submitted for 2022-2023 academic year.

eTASFA Updates

- Sent recommendations to legislature by January 1, 2021.
- Identified funding to support development.
- Established eTASFA Workgroup to guide content and technical development.
- Development is underway.
- Seeking legislation to make eTASFA available for students submitting applications for 2023-2024.
- Working on eTASFA filing status in ApplyTexas Counselor Suite.

Frequently Asked Topics

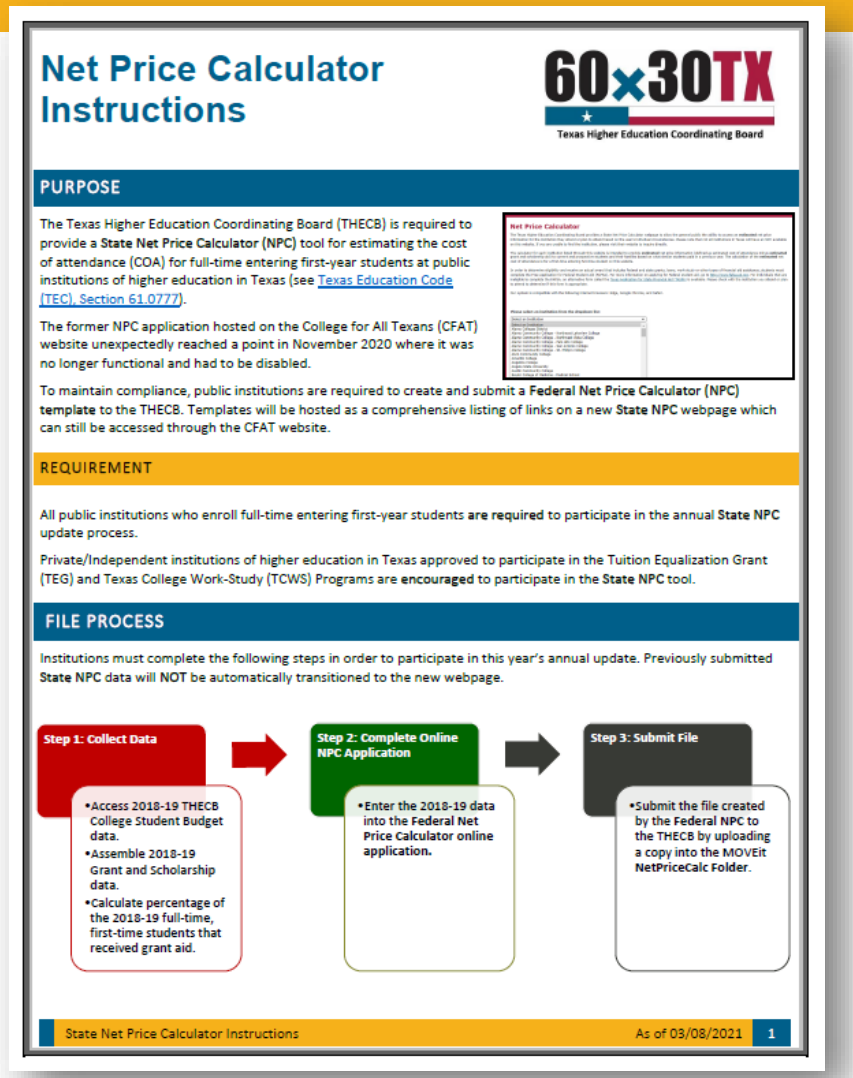
Topic #1: Net Price Calculator

Original notice:

03/09/2021 Net Price Calculator FY 2021 Update Memo [PDF]

All public institutions that enroll full-time entering first-year students are **required** to submit a file to the THECB; private/independent institutions are *encouraged* to participate.

Deadline Apr. 16, 2021



Net Price Calculator Instructions

60x30TX Texas Higher Education Coordinating Board

PURPOSE

The Texas Higher Education Coordinating Board (THECB) is required to provide a **State Net Price Calculator (NPC)** tool for estimating the cost of attendance (COA) for full-time entering first-year students at public institutions of higher education in Texas (see Texas Education Code (TEC), Section 61.0777).

The former NPC application hosted on the College for All Texans (CFAT) website unexpectedly reached a point in November 2020 where it was no longer functional and had to be disabled.

To maintain compliance, public institutions are required to create and submit a **Federal Net Price Calculator (NPC) template** to the THECB. Templates will be hosted as a comprehensive listing of links on a new **State NPC** webpage which can still be accessed through the CFAT website.

REQUIREMENT

All public institutions who enroll full-time entering first-year students **are required** to participate in the annual **State NPC** update process.

Private/Independent institutions of higher education in Texas approved to participate in the Tuition Equalization Grant (TEG) and Texas College Work-Study (TCWS) Programs are **encouraged** to participate in the **State NPC** tool.

FILE PROCESS

Institutions must complete the following steps in order to participate in this year's annual update. Previously submitted **State NPC** data will **NOT** be automatically transitioned to the new webpage.

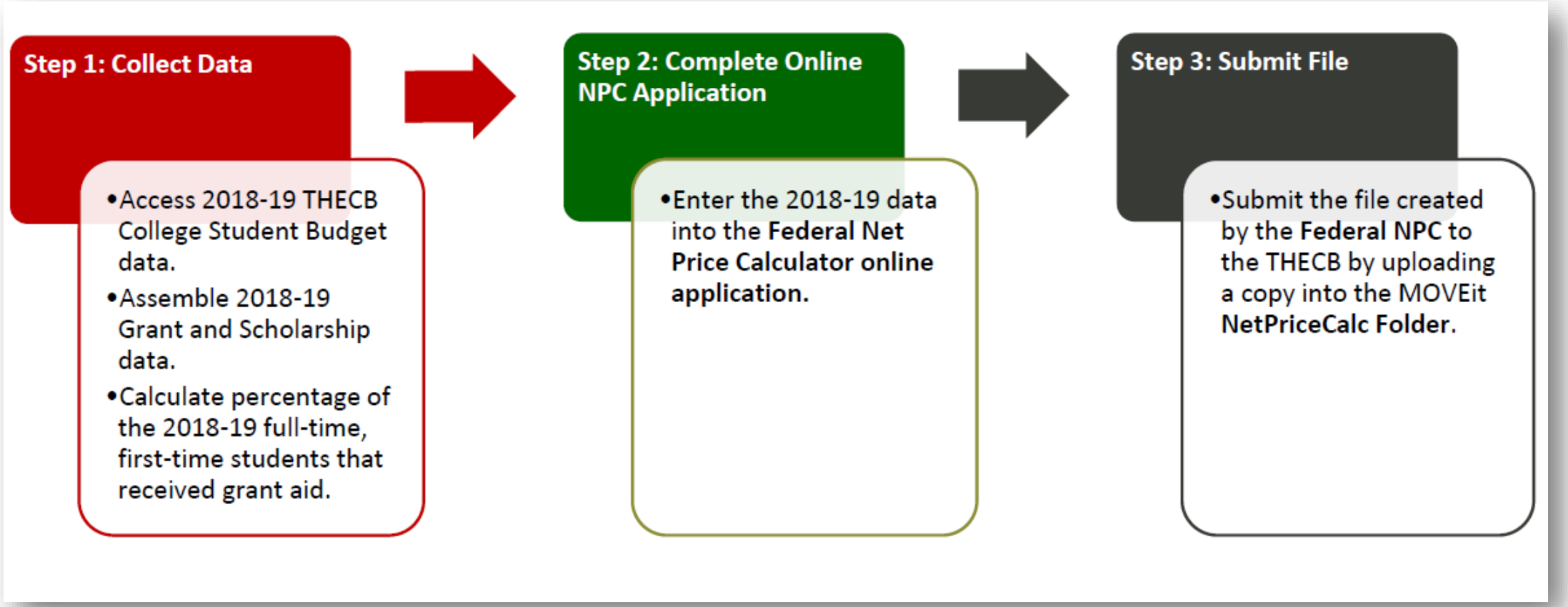
Step 1: Collect Data
- Access 2018-19 THECB College Student Budget data.
- Assemble 2018-19 Grant and Scholarship data.
- Calculate percentage of the 2018-19 full-time, first-time students that received grant aid.

Step 2: Complete Online NPC Application
- Enter the 2018-19 data into the **Federal Net Price Calculator online application.**

Step 3: Submit File
- Submit the file created by the **Federal NPC** to the THECB by uploading a copy into the MOVEit **NetPriceCalc Folder**.

State Net Price Calculator Instructions As of 03/08/2021 1

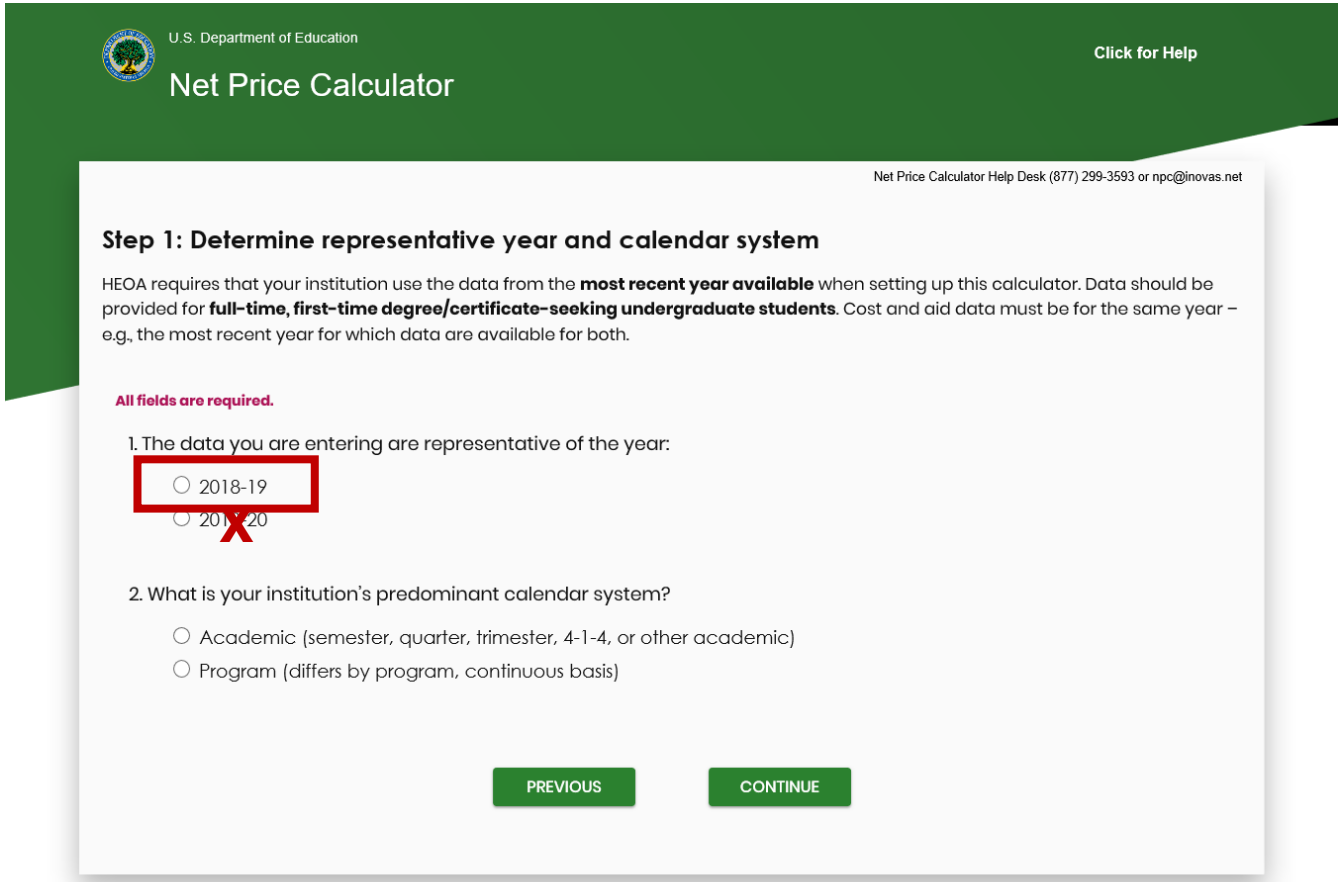
NPC: New Process



NPC: Template

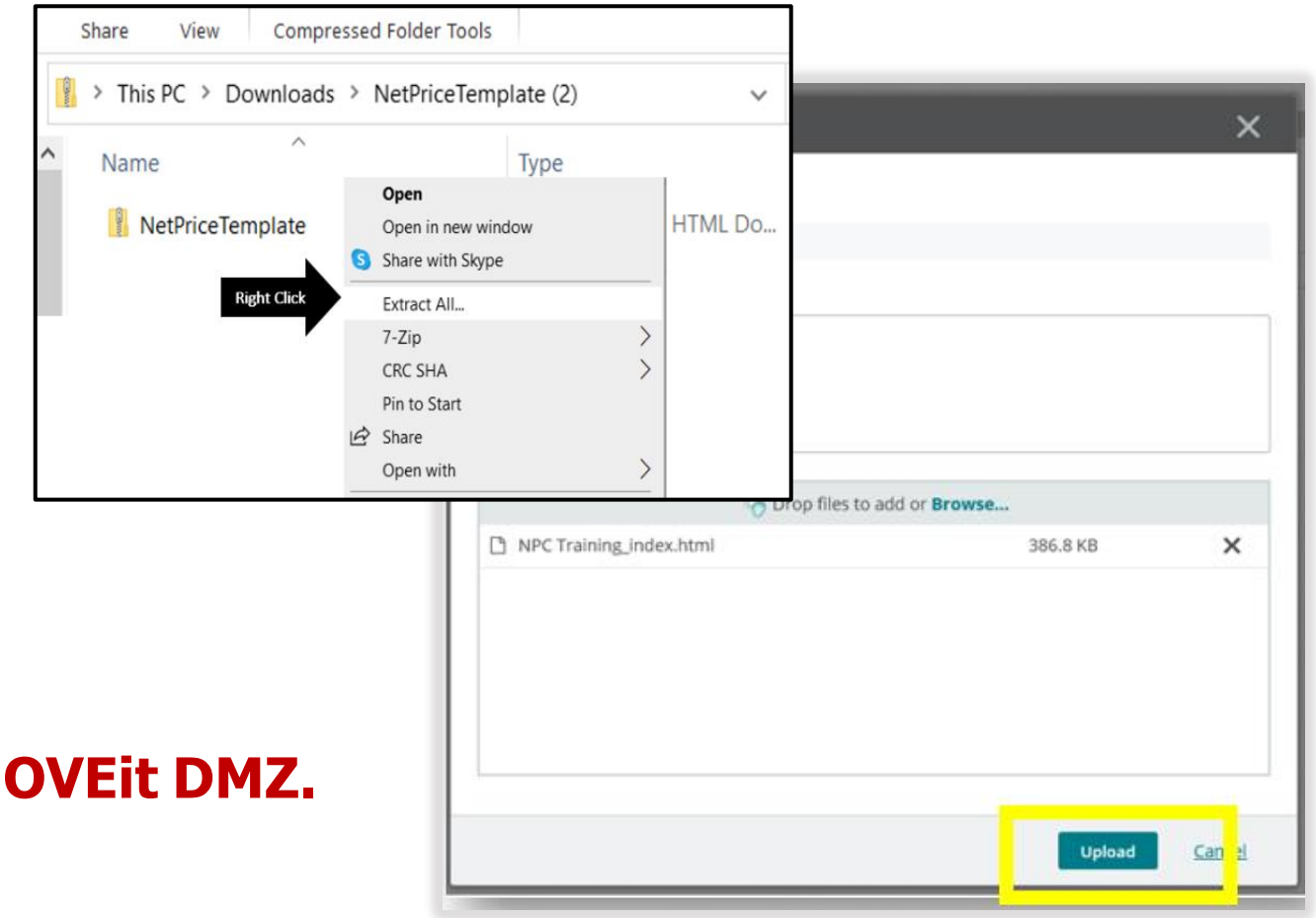
Institutions must submit **2018-19 template** using 2018-19 budget information provided by THECB.

DO NOT submit 2019-20 template now available online.



NPC: File Type

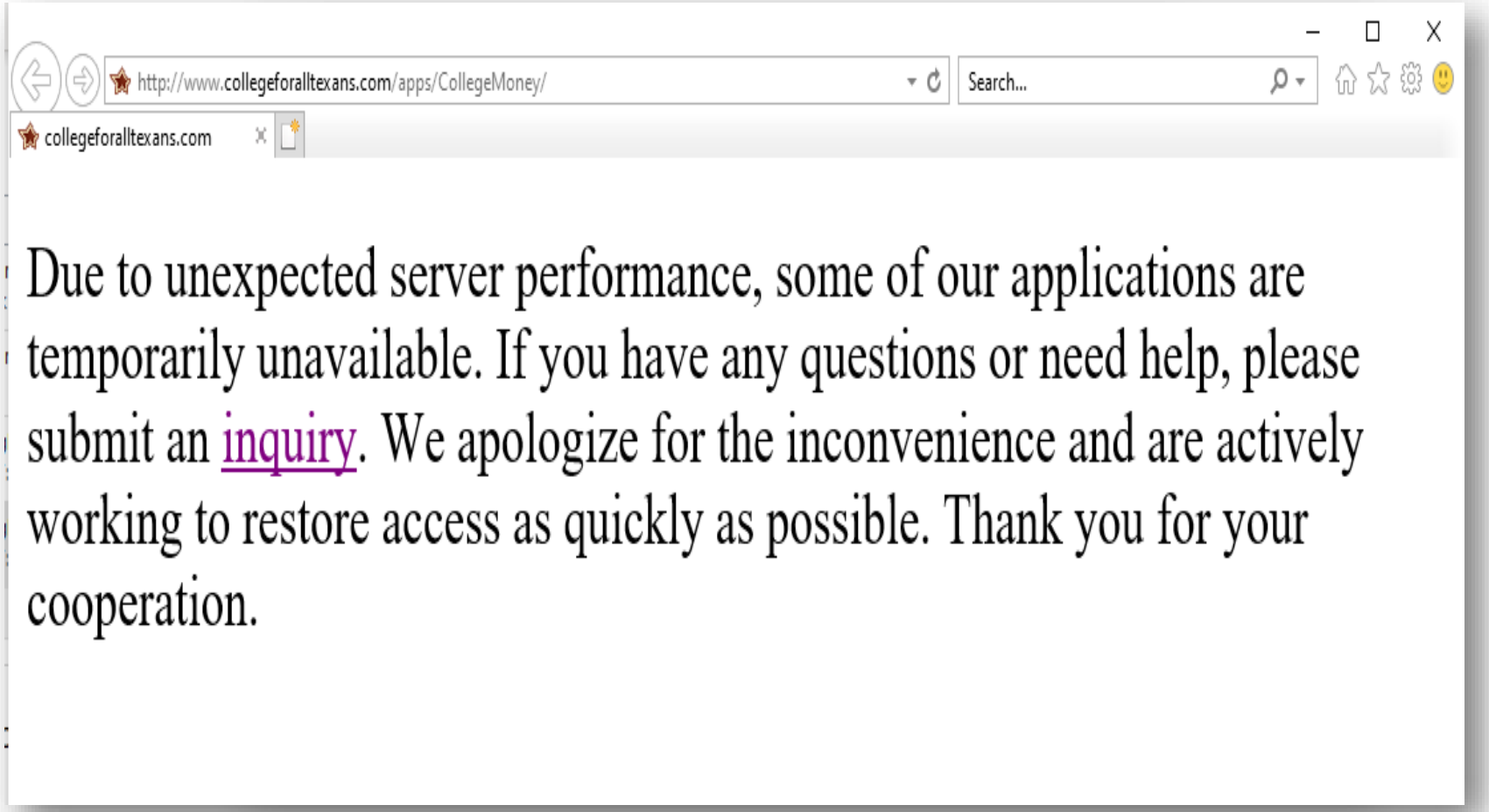
- In order to submit the file to the THECB, institutions **must** first extract the Index File from the downloaded Zip File.
- Steps on the extraction process are included in the instructions.



Do NOT upload a .zip file into MOVEit DMZ.

NPC: Relink Website

- College for All Texans (CFAT) was updated to reroute to the new NPC webpage.
- Any links hosted on the institution's website that are routed to the old NPC page need to be relinked to avoid an error message for the end-users.

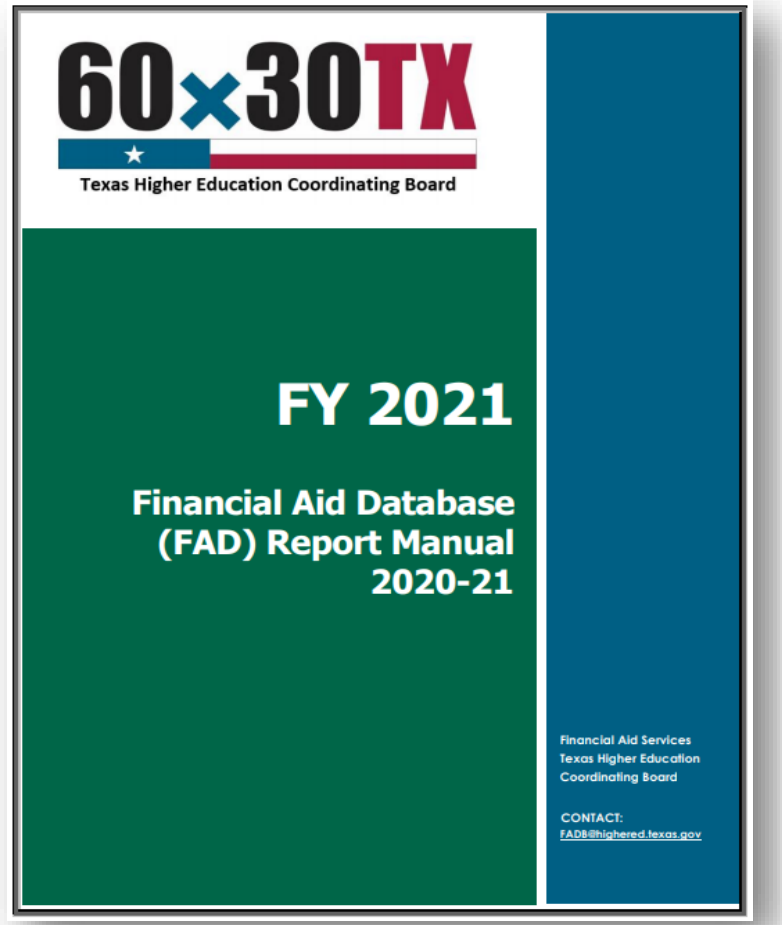


Financial Aid Database (FAD)

Topic #2: FY 2021 FAD Updates

- State Grant GEER Funding
  - Students should be coded as initial and renewal based on their eligibility.
  - Even though reconciliation is not required for cycle one, these students must be reported using the available state grant data elements.

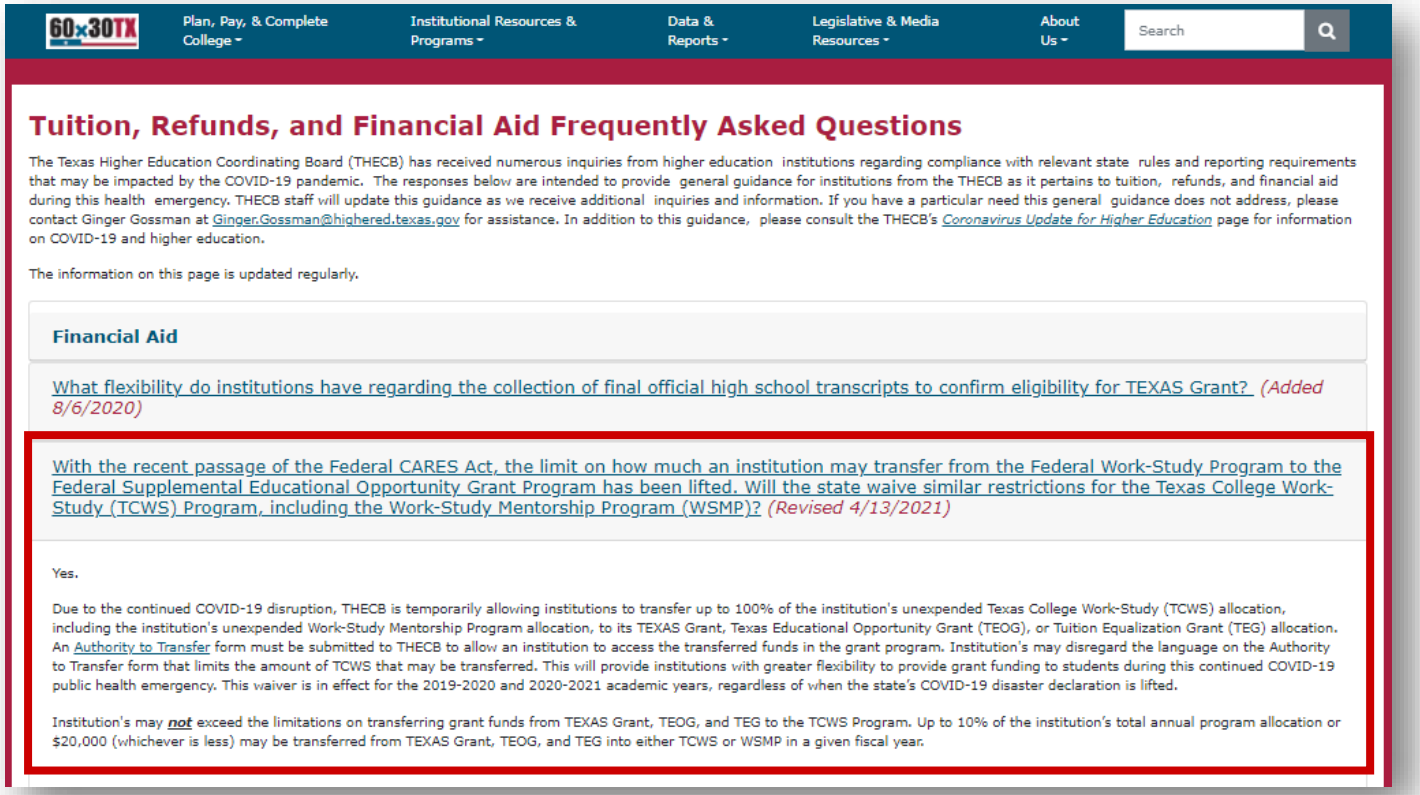
- Emergency Federal Funding
  - Funding provided through GEER/CARES/HEERF that is not considered Estimated Financial Aid (EFC) should not be included on FADs; otherwise, the student records will receive an error.



Authority to Transfer Process

Topic #3: Authority to Transfer 2020-21

- Notice released: **Apr. 13, 2021**
- The online FAQ has been modified for 2020-21.
- Institutions have the option to transfer up to 100% of TCWS/WSMP into the applicable state grant program.



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Tuition, Refunds, and Financial Aid Frequently Asked Questions

The Texas Higher Education Coordinating Board (THECB) has received numerous inquiries from higher education institutions regarding compliance with relevant state rules and reporting requirements that may be impacted by the COVID-19 pandemic. The responses below are intended to provide general guidance for institutions from the THECB as it pertains to tuition, refunds, and financial aid during this health emergency. THECB staff will update this guidance as we receive additional inquiries and information. If you have a particular need this general guidance does not address, please contact Ginger Gossman at Ginger.Gossman@highered.texas.gov for assistance. In addition to this guidance, please consult the THECB's *Coronavirus Update for Higher Education* page for information on COVID-19 and higher education.

The information on this page is updated regularly.

Financial Aid

What flexibility do institutions have regarding the collection of final official high school transcripts to confirm eligibility for TEXAS Grant? *(Added 8/6/2020)*

With the recent passage of the Federal CARES Act, the limit on how much an institution may transfer from the Federal Work-Study Program to the Federal Supplemental Educational Opportunity Grant Program has been lifted. Will the state waive similar restrictions for the Texas College Work-Study (TCWS) Program, including the Work-Study Mentorship Program (WSMP)? *(Revised 4/13/2021)*

Yes.

Due to the continued COVID-19 disruption, THECB is temporarily allowing institutions to transfer up to 100% of the institution's unexpended Texas College Work-Study (TCWS) allocation, including the institution's unexpended Work-Study Mentorship Program allocation, to its TEXAS Grant, Texas Educational Opportunity Grant (TEOG), or Tuition Equalization Grant (TEG) allocation. An Authority to Transfer form must be submitted to THECB to allow an institution to access the transferred funds in the grant program. Institution's may disregard the language on the Authority to Transfer form that limits the amount of TCWS that may be transferred. This will provide institutions with greater flexibility to provide grant funding to students during this continued COVID-19 public health emergency. This waiver is in effect for the 2019-2020 and 2020-2021 academic years, regardless of when the state's COVID-19 disaster declaration is lifted.

Institution's may ***not*** exceed the limitations on transferring grant funds from TEXAS Grant, TEOG, and TEG to the TCWS Program. Up to 10% of the institution's total annual program allocation or $20,000 (whichever is less) may be transferred from TEXAS Grant, TEOG, and TEG into either TCWS or WSMP in a given fiscal year.

Deadline to request a transfer is Jul. 1, 2021

Authority to Transfer Steps

Step 1:

Send a request through CONTACT US (Select "Financial Aid Question" as contact reason).

Step 2:

THECB will review allocation and send institution a form to confirm approved amount.

Step 3:

Once institution confirms, eligible funding will be transferred to the applicable program for use.

NOTE: TCWS/WSMP funding must be sent back to the THECB before a transfer to a grant program can be completed.

2021-22 Allocations

Topic #4: 2021-22 Allocation Update

- **Preliminary** 10-day data reviews for allocations are being calculated and should be released to institutions in May.
- Directors will be required to review the data for accuracy and report discrepancies within the set 10-day timeframe.
- Programs that require an annual opt in/out will have an opportunity to make changes, if needed.
- **Final** allocations will not be announced until the General Appropriation Act (GAA) is signed by the Governor this summer.

Deadline Reminders and Training

Deadlines & Updates

Deadlines

- TEG Engagement Guide = Apr. 15, 2021
- NPC Upload = Apr. 16, 2021
- FAD Cycle One Validation = Apr. 23, 2021

Update

- Exemption and Waiver Summary
- Available on SFAP Webpage:

https://reportcenter.highered.texas.gov/agency-publication/miscellaneous/grant-special-programs-exemptions-and-waivers-summary-list/

Training

- **TASFAA - New Aid Officer Workshop**
  - April 16, 2021
  - April 23, 2021
  - April 30, 2021 (THECB Presenting)
  - May 7, 2021
  - May 14, 2021
  - May 21, 2021
- **Webcast**
  - May 11, 2021

Contacting Student Financial Aid Programs

The following phone lines:

- Texas Financial Aid Information Center
  - Public: (888) 311-8881
- Borrower Services
  - Student Borrowers (Cosigners): (800) 242-3062

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

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 at any time.

Survey and Feedback

Webcast Survey: https://www.surveymonkey.com/r/58YRM92

Contact Us: https://www1.highered.texas.gov/Apps/CRAFT/Home/Create
(Select "Financial Aid Question" as the Contact Reason.)

QUESTIONS