

Texas Higher Education Coordinating Board

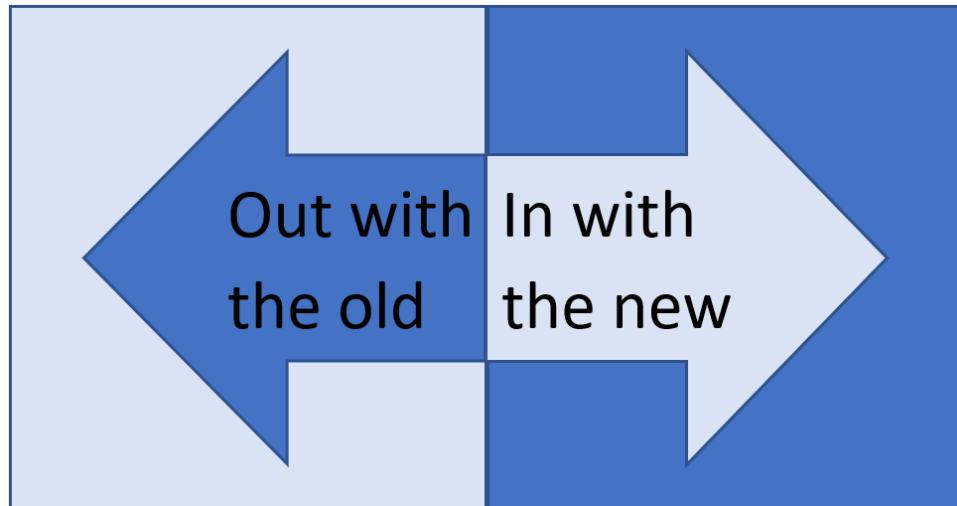
# Student Financial Aid Programs

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## Webcast

August 10, 2021

# TOPICS OF DISCUSSION



FY 2022 Funds Request Process

Comptroller Closure Impacts

Federal Changes to State Aid Programs

FAFSA/TASFA High School Graduation Requirement

Reminders, Training and updates

# FY 2022 Funds Request Process

# Requesting Funds 2021-22

- TEXAS Grant, TEOG, and TEG: CBPass Grant Payment Portal
- CAL/TASSP: HelmNet or Commonline File
- Bilingual Education Program: Funds Request Form (PDF)
- Educational Aide Exemption: Funds Request Form (PDF)
- Texas College Work-Study Programs: Lump-sum payment (no request needed)

# Grant Payment System

Follow these four easy steps to request funds for:  
TEXAS Grant, TEOG or TEG

Step 1. Log in to [CBPass](#) and select **Grant Payment** from MY ACCESS webpage.



MY ACCESS PROFILE

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

App ID	Application Name
139	<a href="#">Financial Aid Data Certification</a>
130	<a href="#">Good Neighbor Scholarship Program</a>
123	<a href="#">Grant Payment</a>
138	<a href="#">Integrated Fiscal Reporting System</a>

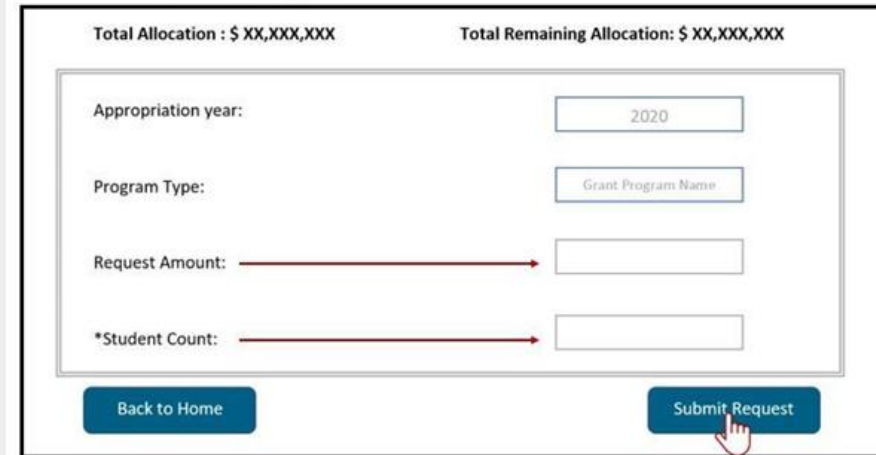
Step 2. Select **Request Funds** from navigation bar.



60x30TX Grant Payment Process – Institution Home Transaction Details **Request Funds** Return Funds Award History Log off

Step 3. Enter **Request Amount** and **Student Count**.

Step 4. Click **Submit Request**.



Total Allocation : \$ XX,XXX,XXX Total Remaining Allocation: \$ XX,XXX,XXX

Appropriation year:

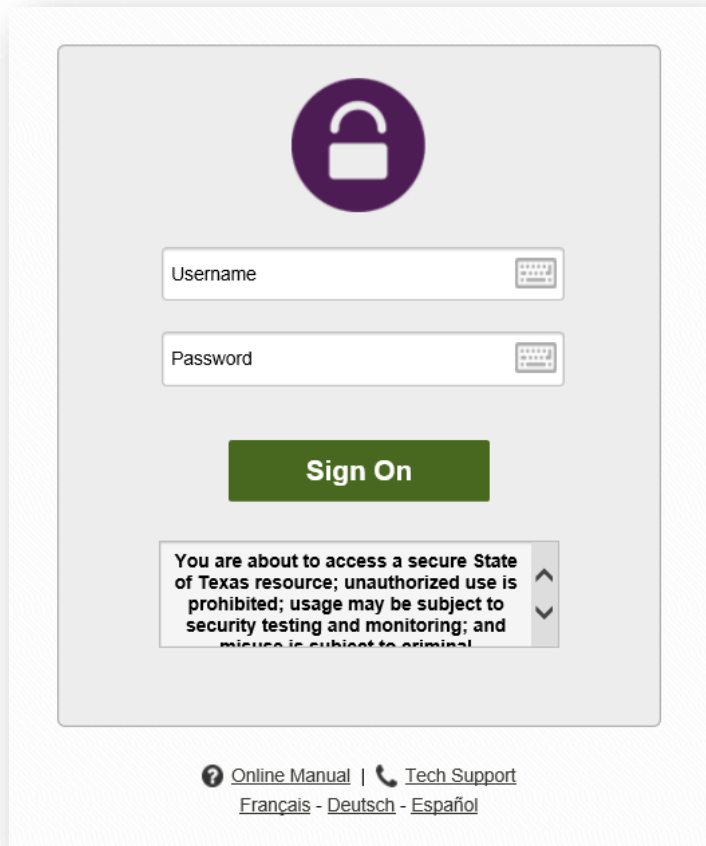
Program Type:

Request Amount:

\*Student Count:

# CAL/TASSP Certifications

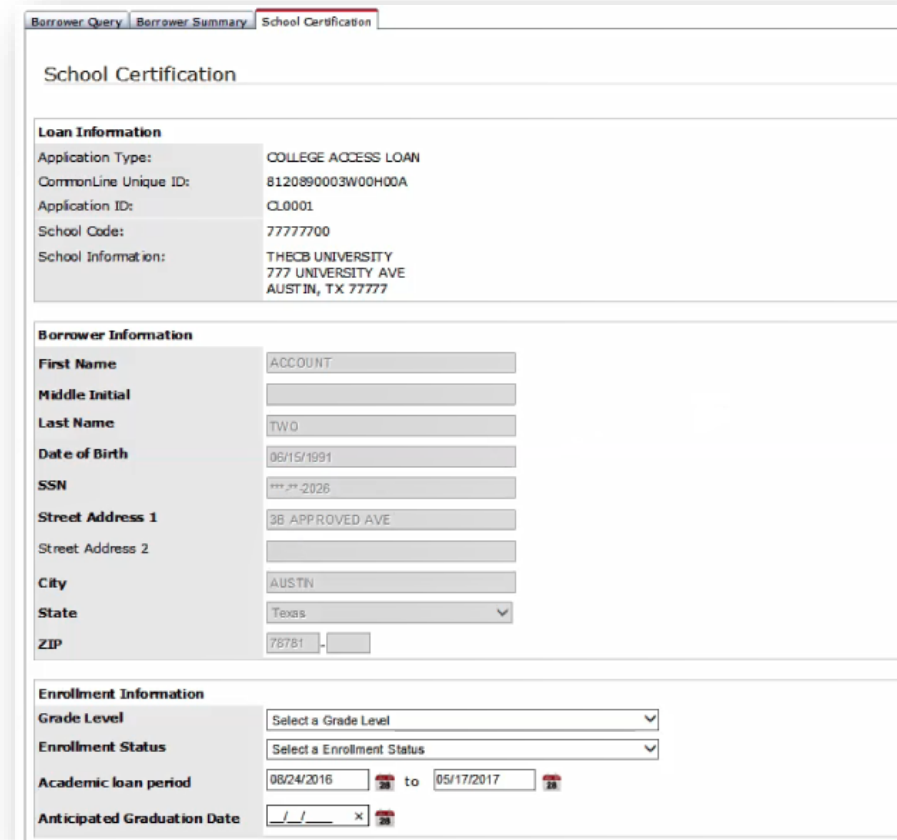
Commonline file via MOVEit



A login interface for the Commonline system via MOVEit. It features a purple padlock icon at the top. Below it are two input fields: 'Username' and 'Password', each with a small icon to its right. A green 'Sign On' button is centered below the fields. At the bottom, there is a disclaimer box with a scroll bar: 'You are about to access a secure State of Texas resource; unauthorized use is prohibited; usage may be subject to security testing and monitoring; and misuse is subject to criminal...'. At the very bottom, there are links for 'Online Manual' and 'Tech Support', and language options: 'Français - Deutsch - Español'.

OR

Manual certification via HelmNet



A manual certification interface via HelmNet. It has a tabbed header with 'Borrower Query', 'Borrower Summary', and 'School Certification'. The 'School Certification' tab is active. The form is divided into three main sections: 'Loan Information', 'Borrower Information', and 'Enrollment Information'.  
**Loan Information:**  
Application Type: COLLEGE ACCESS LOAN  
CommonLine Unique ID: 8120890003W00H00A  
Application ID: CL0001  
School Code: 77777700  
School Information: THECB UNIVERSITY, 777 UNIVERSITY AVE, AUSTIN, TX 77777  
**Borrower Information:**  
First Name: ACCOUNT  
Middle Initial:   
Last Name: TWO  
Date of Birth: 06/15/1991  
SSN: \*\*\*-\*\*-2026  
Street Address 1: 36 APPROVED AVE  
Street Address 2:   
City: AUSTIN  
State: Texas (dropdown)  
ZIP: 78781  
**Enrollment Information:**  
Grade Level: Select a Grade Level (dropdown)  
Enrollment Status: Select an Enrollment Status (dropdown)  
Academic loan period: 08/24/2016 to 05/17/2017  
Anticipated Graduation Date: / / x

# Funds Request Form

**Texas Higher Education Coordinating Board**

2021-22 (FY 2022)  
Educational Aide Exemption  
Funds Request Form

Date:		FICE Code:		Institution:	
Contact Information					
Position	Name	Email	Phone		
Financial Aid Director					
Reporting Financial Aid Officer					
Business Office Contact					

Current Request		
Education Aide Exemption Program	Current amount being requested.	Number of unique student awards being funded via current request. *

Year-to-Date Totals		
Total Educational Aide Exemption Allocation	Year-to-date amount requested including current request. **	Number of year-to-date distinct student awards funded including current request. ***

\* The count of recipients receiving program funds for the first time this award year via this current request.  
 \*\* The cumulative total amount of funds requested this fiscal year, including this request. \*\*\* The total number of distinct students who have received funds this fiscal year, including those who will receive funds from this request.

For further clarification on how to complete this form, refer to the [Forms Request Form Instructions](#).

**To send the completed form:**

- Click the **SUBMIT** button.
- An email with this form attached will open in a new window.
- Enter the six-digit FICE code and file name in the subject line.
- Example: 012345\_EAE Funds Request Form FY 2022
- Click the **SEND** button to email the form.



## Funds Request Form Instructions Bilingual Education Program

The Bilingual Education Program Funds Request Form (FRF) enables institutions to request program funds throughout the year on an as-needed basis and facilitates reconciliation between an institution's financial aid and business offices and the Texas Higher Education Coordinating Board (THECB). To complete the Funds Request Form, follow these instructions:

### STEP 1: Complete the Contact Information Section

- Date** - the date the Funds Request Form is submitted to the THECB.
- FICE Code** - the institution's six-digit identification code.
- Institution** - the name of the requesting institution.
- Financial Aid Director** - accountable for overseeing the program at the institution.
- Reporting Financial Aid Officer** - assigned to monitor the program.
- Business Office Contact** - responsible for reconciling the program account with the Financial Aid Office.

Date:		FICE Code:		Institution:	
Contact Information					
Position	Name	Email	Phone		
Financial Aid Director					
Reporting Financial Aid Officer					
Business Office Contact					

**NOTE: If the Financial Aid Director is also the Reporting Financial Aid Officer, enter the same information in both rows.**

### STEP 2: Complete the Current Request Section

Enter the current amount of funds being requested and the total number of **unique students** awarded.

- Each award recipient is a **unique student** and is only reported in the **Current Request Section** once per award year regardless of how many disbursements the student is issued.

Current Request		
	Current amount being requested	Number of unique student awards being funded via current request*
Bilingual Education Program		

**Note:** If the institution is requesting funds for **only previously reported students** in the current award year, the **unique student** awards count would be zero.

### STEP 3: Complete the Year-to-Date Totals Section

All elements require a **cumulative total** in this section.

- Total Bilingual Education Allocation** - The total program allocation amount for the current academic year.
- YTD amount requested** - The sum of all the year-to-date funds requested, including the **current** amount being requested on the form.
- Number of YTD distinct student awards** - The total number of **unique students** who have received funds this entire academic year, including the current total requested above on the form.

Year-to-Date Totals		
Total Bilingual Education Allocation	Year-to-date amount requested including current request**	Number of year-to-date distinct student awards funded including current request***

**NOTE: The institution should use only whole dollar amounts when entering values on the Funds Request Form.**

# Comptroller Closure Updates



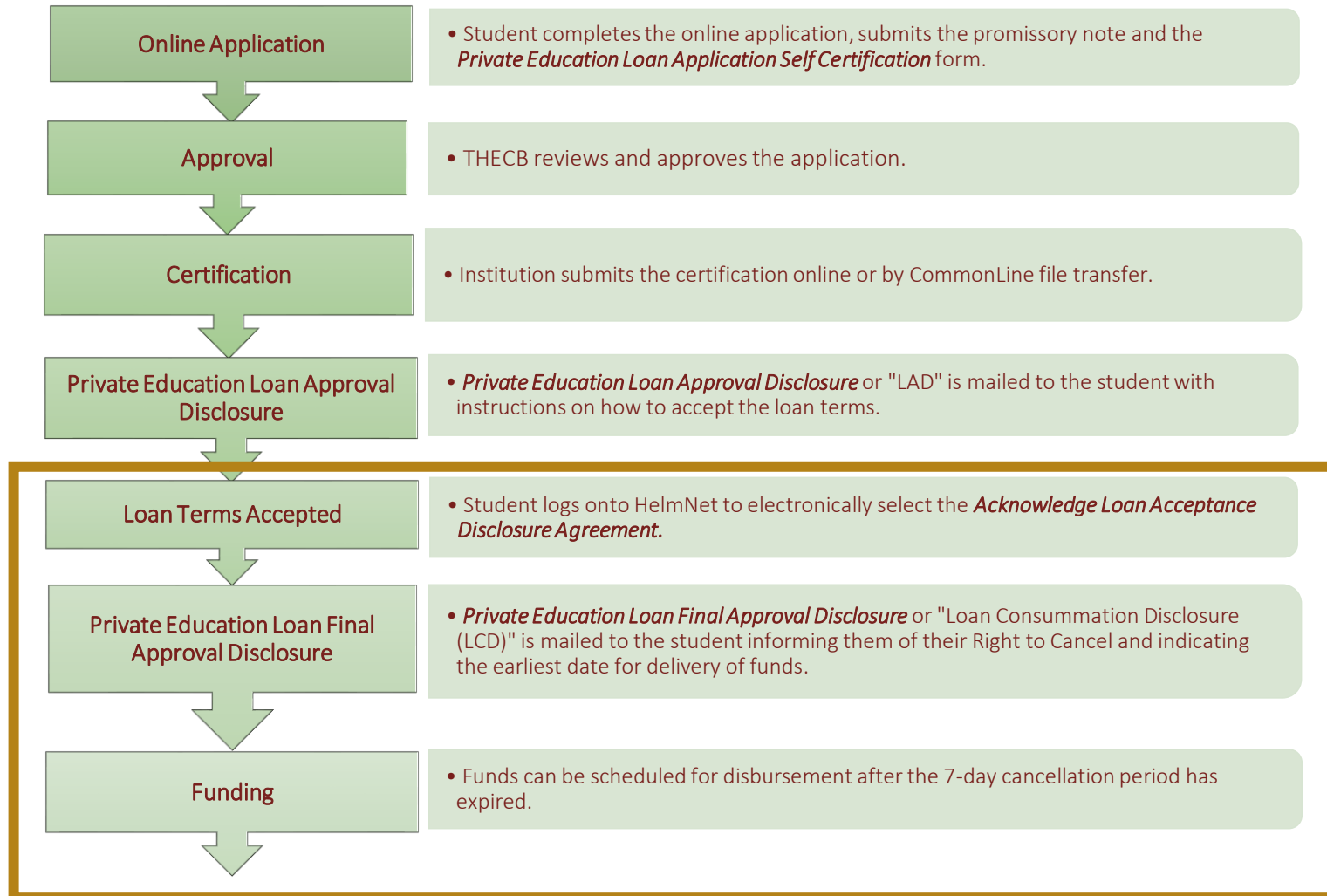
# Comptroller Closure – Grants and Special Programs



## State Financial Aid Program Impact:

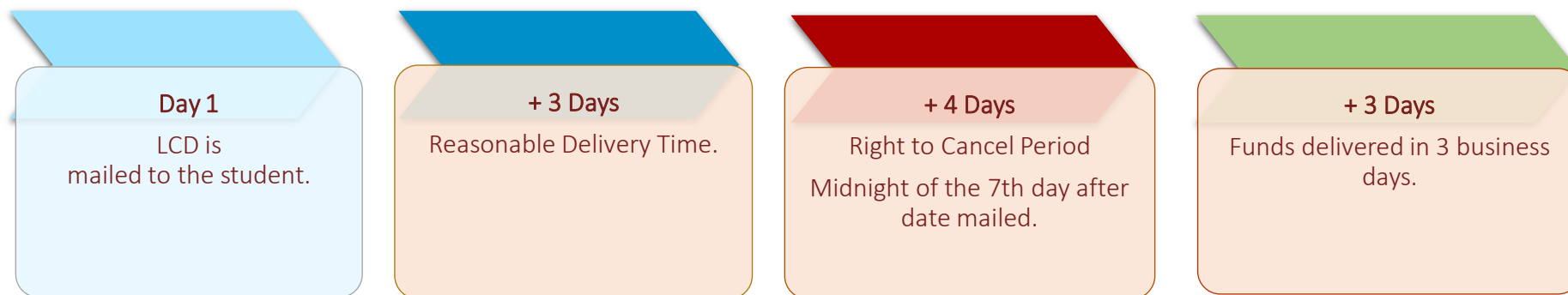
- Closure from 7 p.m. Aug. 31 through 7 a.m. Sept. 2, 2021.
- Payments for grants and special programs from the THECB will begin after the Sept. 6, 2021, Labor Day holiday.

# Review of Disbursement Process



# Standard Disbursement Schedule

11 Business Days



## Example:

- LAD Accepted = 8/10
- LCD Process (right to cancel) = 8/11 - 8/19
- Extract Begins = 8/20
  - 3 business days prior to disbursement
- Disbursement = 8/25

## August 2021

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7
8	9	10 LAD	11 LCD	12 LCD	13 LCD	14
15	16 LCD	17 LCD	18 LCD	19 LCD	20 Extract	21
22	23 Extract	24 Extract	25 Disbursal	26	27	28
29	30	31				

# Comptroller Closure – State Loans and Scholarships

COMPTROLLER'S OFFICE CLOSURE 2021 DISBURSEMENT CHART					
DAY	LAD ACCEPTED		EARLIST EXTRACT DATE	EARLIST FUNDS ARRIVAL DATE	NOTES
THURSDAY	8/5/2021	Normal LAD processing, Extraction and Disbursal	8/17/2021	8/20/2021	Final days of normal application funding after LAD is completed. Funds will not be delayed getting to the school due to LABOR DAY nor the COMPTROLLER being closed.
FRIDAY	8/6/2021		8/18/2021	8/23/2021	
SATURDAY	8/7/2021		8/19/2021	8/24/2021	
SUNDAY	8/8/2021		8/19/2021	8/24/2021	
MONDAY	8/9/2021		8/19/2021	8/24/2021	
TUESDAY	8/10/2021		8/20/2021	8/25/2021	
WEDNESDAY	8/11/2021		8/23/2021	8/26/2021	
THURSDAY	8/12/2021		8/24/2021	8/27/2021	
FRIDAY	8/13/2021		8/25/2021	8/30/2021	
DAY	LAD ACCEPTED		EARLIST EXTRACT DATE	EARLIST FUNDS ARRIVAL DATE	NOTES
SATURDAY	8/14/2021	LAST DAYS FOR BORR TO ACCEPT LAD, TO DISBURSE PRIOR TO COMPTROLLER CLOSURE	8/25/2021	8/31/2021	Final extract run will be Aug 25th batch run, for funds to arrive @ schools Aug. 31. Comptroller closed from 7pm 8/31 - 9/1. First day of processing will be 7am 9/2
SUNDAY	8/15/2021		8/25/2021	8/31/2021	
MONDAY	8/16/2021		8/25/2021	8/31/2021	

## State Financial Aid Program Impact:

- Loan Acceptance Disclosure (LAD) must be completed by **Aug. 16, 2021**, for funds to arrive before the Comptroller shut down on Aug. 31, 2021.

# HelmNet Reporting Tool

- Financial aid administrators with HelmNet permissions can run the **Pending Disbursement- Need Documents Report** to identify students that have not acknowledged the LAD in HelmNet.
- Administrators can access the **Borrower Summary** tab to determine if the LAD has been acknowledged on the loan application checklist by searching the student's account.

Status: Incomplete

Task	Completion Date	Responsibility
✓ Borrower Application Completed ?	7/31/2021	Borrower
✓ Borrower Application Signed ?	7/31/2021	Borrower
✓ Private Education Loan Applicant Self-Certification (BCF) Signed ?	7/31/2021	Borrower
✓ Cosigner Application Completed ?	7/31/2021	Cosigner
✓ Cosigner Application Signed ?	7/31/2021	Cosigner
✓ Credit Approved ?	5/13/2021	Lender
✓ Lender Approval Completed ?	8/4/2021	Lender
✓ School Certification Completed ?	8/4/2021	School
✓ Loan Guaranteed ?	8/4/2021	Lender
✓ Private Education Loan Approval Disclosure (LAD) Sent ?	8/4/2021	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

# Federal Updates: Impacts to State Financial Aid

# State Eligibility for 2021-2022

Memo sent Aug. 5, 2021

## **Institutions can NOT modify process**

### **Selective Service:**

- The statute under Texas Education Code did not change during the 87th legislative session so institutions should continue to confirm registration, or exemption, to determine eligibility for state financial aid programs.
- FAFSA will continue to include the SS confirmation status on the ISIR until 2023-24.

### **Controlled Substance:**

- Institutions are still required to confirm program eligibility for state financial aid for the Toward EXcellence Access and Success (TEXAS) Grant and Texas Educational Opportunity Grant (TEOG).
- Institutions should continue using their current process to verify the Controlled Substance requirement is met.

## **Institutions can modify process**

### **ISIR Verification:**

- Institutions may choose to apply federal verification guidance to the state financial aid programs.
- TASFA students are **often** selected by an institution for verification since documentation is needed to calculate a valid EFC; BUT, institutions maintain the discretion to select students for verification according to consistently applied institutional policies.
  - If a process is in place to calculate a valid EFC without verifying, continue to use that process.

# FAFSA/TASFA High School Graduation Requirement



# FAFSA/TASFA

## High School Graduation Requirement

### Overview:

1. The 86<sup>th</sup> Texas Legislature passed HB 3 into law under Texas Education Code 28.0256.
2. Beginning with students enrolled in 12th grade during the 2021-22 school year, each student must complete and submit a FAFSA/TASFA or a signed opt-out form.
3. Institutions should anticipate receiving an increase in FAFSA/TASFA submissions starting Oct. 1, 2021.
4. High school students submitting a paper TASFA may contact the institution requesting proof of submission; especially those that may not apply for college but are simply submitted one to meet the requirement.

# Reminders, Training and Updates

# Reminders

## Funds Request FY 2022

- Institutions can begin submitting a Funds Request Form

## Signed PPA due to the THECB – Aug. 18, 2021

- Email signed copy to:  
[Jodie.Lopez@highered.texas.gov](mailto:Jodie.Lopez@highered.texas.gov)

## FAD Cycle Two – Aug. 27, 2021

- Files must be validated but reconciliation is NOT required.

# Training

Next Monthly Webcast – Sept. 14, 2021

# Update

## College Access Loan Deactivation

- A new batch process will begin in September to deactivate any application that is 60+ days old.

# Contacting Student Financial Aid Programs

The following phone lines are available for borrower 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 at any time.

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

# Submitting 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**

**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)

| [Help](#)

# Questions?