State Financial Aid Webcast

Student Financial Aid Programs
May 11, 2021

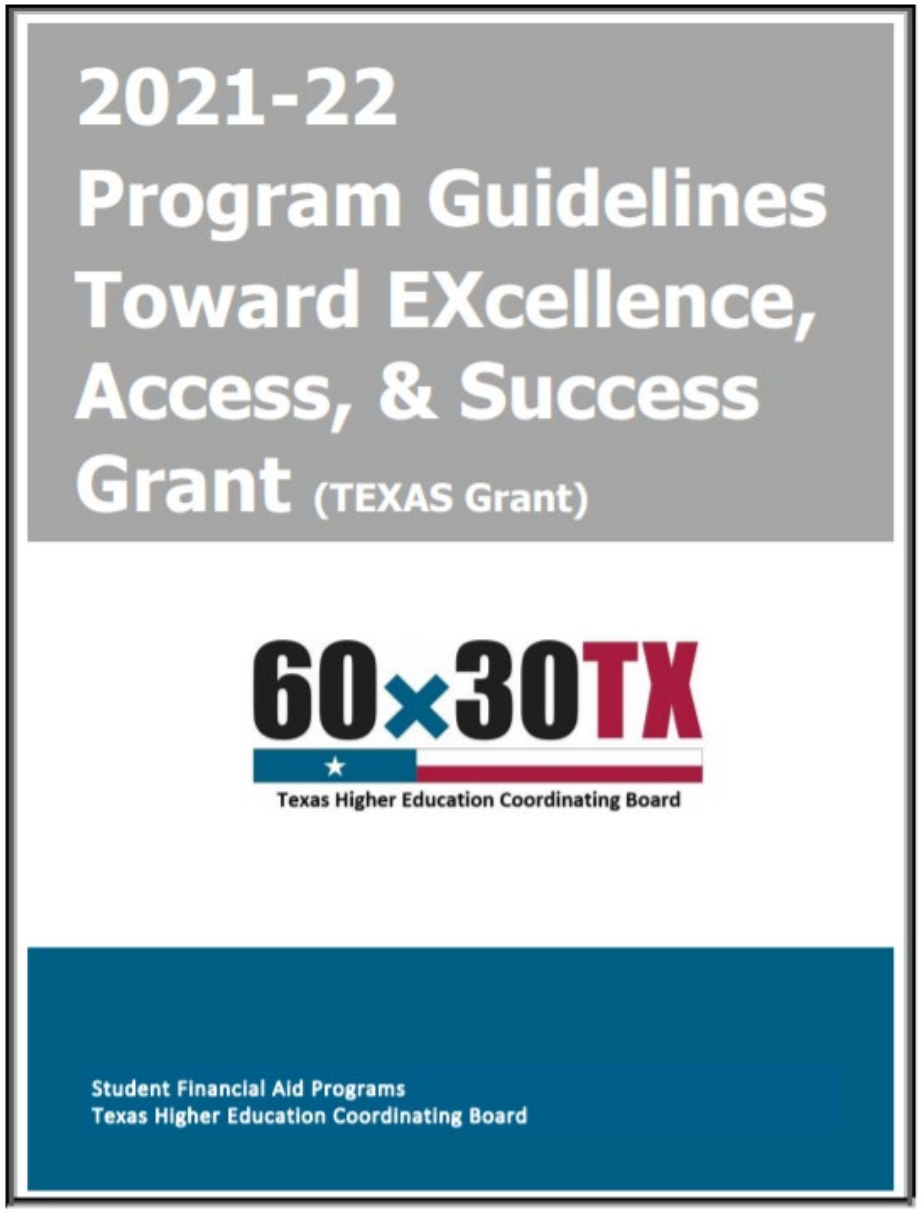
TOPICS OF DISCUSSION

- 2021-22 Program Guidelines: Updates
- Work-Study Student Mentorship Program (WSMP): New Reporting Portal
- Updates, Training and Deadline Reminders

2021-22 Program Guidelines: Updates

Annual Updates

- Program Years
- Award Amounts
- Deadline Dates
- Priority EFC



Annual Updates

- Program Years
- Award Amounts
- Deadline Dates
- Priority EFC

NEW **SUMMER AWARDING**

All basic eligibility requirements remain the same for summer terms, including the student's minimum enrollment status. Since summer terms vary in length and in the number of hours a student can enroll, summer terms or modules can be combined to establish the student's enrollment hours for eligibility purposes.

SEMESTER MAXIMUM (19 TAC, SECTION 22.261)

Students receiving a TEOG cannot exceed the **semester** maximum. Students may be issued a total of 3 awards (Fall, Spring, and Summer) in an academic year.

2021-22 AWARD MAXIMUMS

Students may be issued a total of 3 awards (Fall, Spring, and Summer) in an academic year.

INSTITUTION TYPE	YEAR MAX (Fall, Spring, and Summer)	SEMESTER MAX
PUBLIC STATE COLLEGES	$6,429	$2,143
PUBLIC TECHNICAL INSTITUTES	$9,714	$3,238
PUBLIC COMMUNITY COLLEGES	$5,133	$1,711

⚠ **ALERT: Enrollment Status at Census Discontinued**

A student's enrollment status at census is no longer a determining factor when calculating the award amount (see Proration Requirement Removed).

Annual Updates

- Program Years
- Award Amounts
- Deadline Dates
- Priority EFC

Financial Report and Annual Outcome Report		
Report	**Reporting Period**	**Due Date**
• Financial Report ○ Upload Title III Eligibility Letter if applicable	September 1 - May 31, 2022	June 5, 2022
• Financial Report • Annual Outcome Report ○ Upload Off-Campus MOU if applicable	September 1 - August 31, 2022	September 5, 2022

Note: Failure to meet the program reporting requirements may result in the loss of funding.

Annual Updates

- Program Years
- Award Amounts
- Deadline Dates
- Priority EFC

ALERT: Priority Expected Family Contribution (EFC)

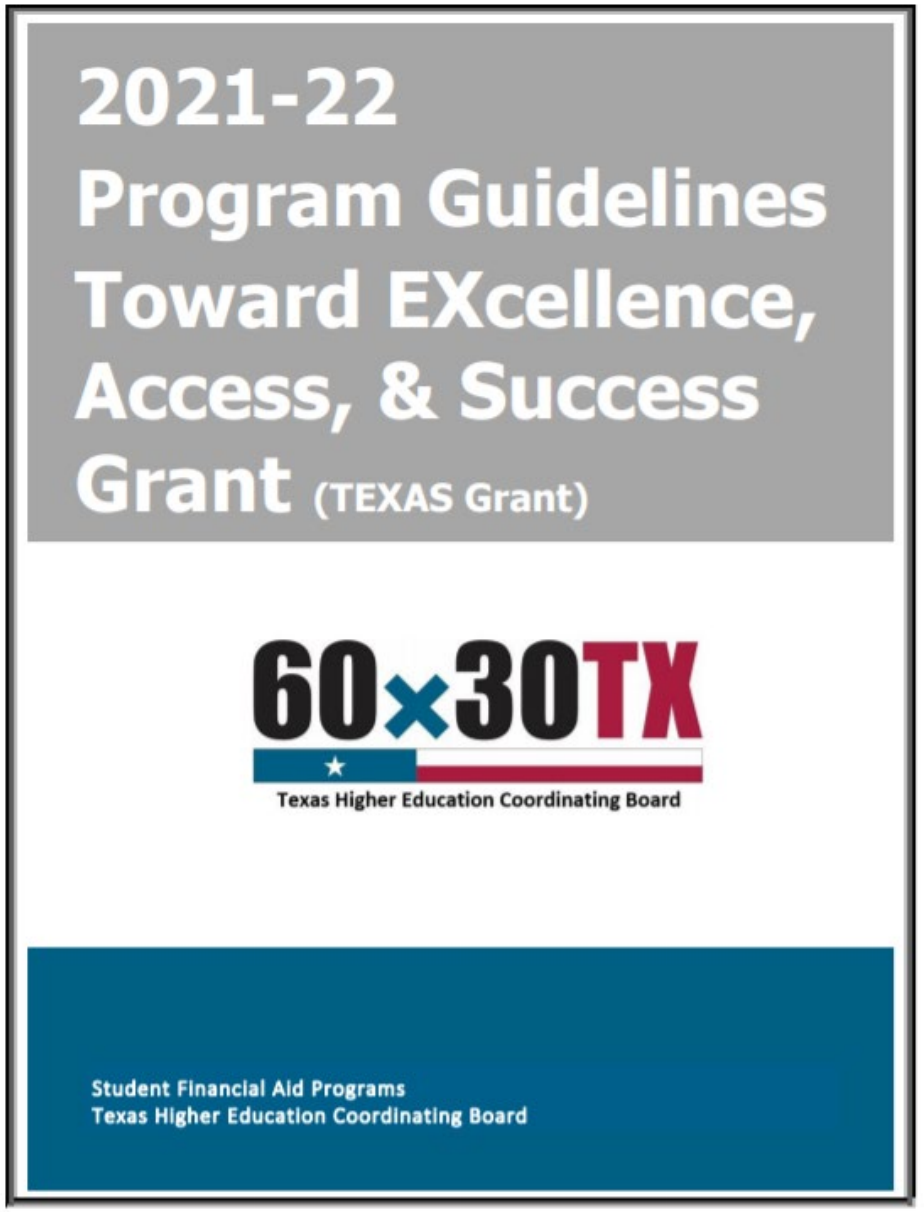
The **priority EFC** set by the THECB should serve as a method for prioritizing initial year awards for eligible students and is not an eligibility requirement to receive an award. The calculated priority EFC for 2021-22 is **$6,234.**

Enhancements

Links to TEC and TAC Rules in each of the relevant section headings were added back.

PDF copies of the statutes and rules used to create the guidelines were published and archived for future reference.

Frequently Asked Questions (FAQ) are now included as an appendix.



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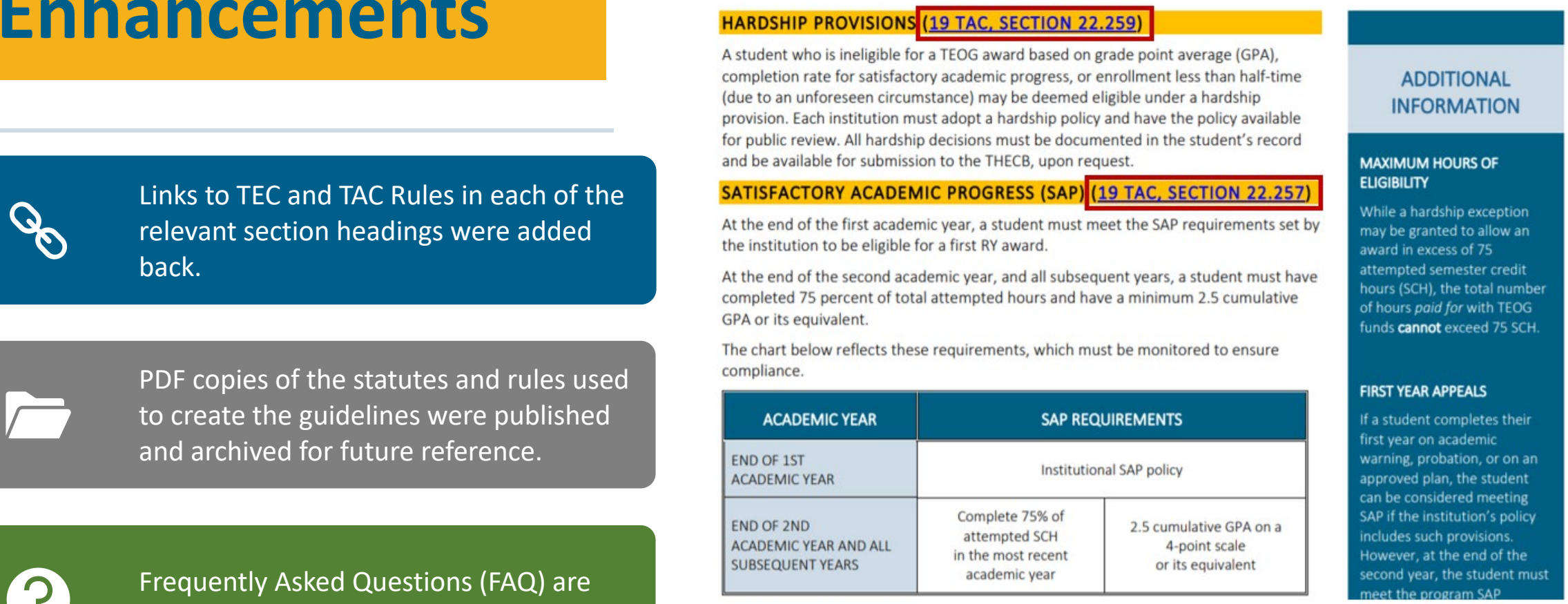

HARDSHIP PROVISIONS (19 TAC, SECTION 22.259)

A student who is ineligible for a TEOG award based on grade point average (GPA), completion rate for satisfactory academic progress, or enrollment less than half-time (due to an unforeseen circumstance) may be deemed eligible under a hardship provision. Each institution must adopt a hardship policy and have the policy available for public review. All hardship decisions must be documented in the student's record and be available for submission to the THECB, upon request.

SATISFACTORY ACADEMIC PROGRESS (SAP) (19 TAC, SECTION 22.257)

At the end of the first academic year, a student must meet the SAP requirements set by the institution to be eligible for a first RY award.

At the end of the second academic year, and all subsequent years, a student must have completed 75 percent of total attempted hours and have a minimum 2.5 cumulative GPA or its equivalent.

The chart below reflects these requirements, which must be monitored to ensure compliance.

ACADEMIC YEAR	SAP REQUIREMENTS	
END OF 1ST ACADEMIC YEAR	Institutional SAP policy	
END OF 2ND ACADEMIC YEAR AND ALL SUBSEQUENT YEARS	Complete 75% of attempted SCH in the most recent academic year	2.5 cumulative GPA on a 4-point scale or its equivalent

ADDITIONAL INFORMATION

MAXIMUM HOURS OF ELIGIBILITY

While a hardship exception may be granted to allow an award in excess of 75 attempted semester credit hours (SCH), the total number of hours *paid for* with TEOG funds **cannot** exceed 75 SCH.

FIRST YEAR APPEALS

If a student completes their first year on academic warning, probation, or on an approved plan, the student can be considered meeting SAP if the institution's policy includes such provisions. However, at the end of the second year, the student must meet the program SAP

Enhancements

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Frequently Asked Questions (FAQ) are now included as an appendix.

APPENDIX 2: QUICK REFERENCES

CONTACT FINANCIAL AID SERVICES	
By phone: (844) 792-2640	
Contact us by completing an online inquiry form and select "Financial Aid Question" as the Contact Reason.	
PROGRAM RULES AND STATUTES	
Texas Program Statutes	Texas Education Code TEC, Chapter 56, Subchapter M [PDF]
Texas Program Rules	Texas Administrative Code 19 TAC, Chapter 22, Subchapter A [PDF] 19 TAC, Chapter 22, Subchapter L [PDF]
WEBSITES, PORTALS AND GUIDES	
General program information for institutions	Student Financial Aid Programs Information Webpage
General college enrollment and financial aid information for students	College for All Texans
Request and return funds, modify student count, and search student award history	CBPass Grant Payment Portal CBPass Quick Start Guide [PDF]

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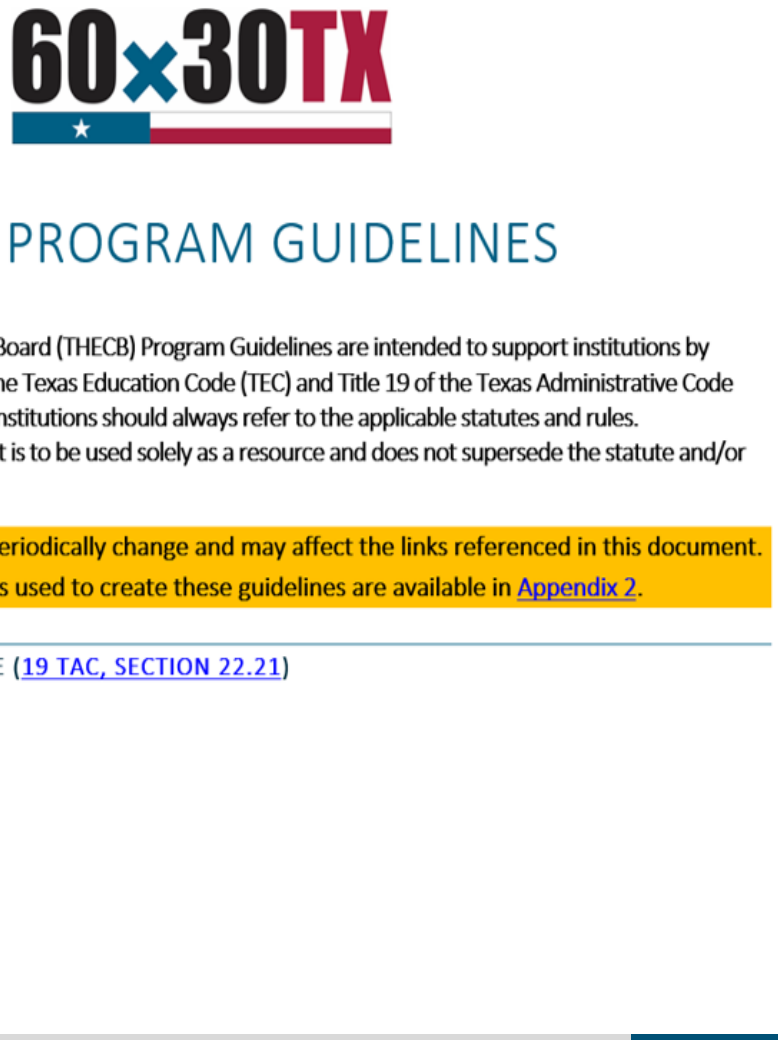

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SAMPLE PROGRAM GUIDELINES

The Texas Higher Education Coordinating Board (THECB) Program Guidelines are intended to support institutions by highlighting requirements that appear in the Texas Education Code (TEC) and Title 19 of the Texas Administrative Code (TAC). When administering this program, institutions should always refer to the applicable statutes and rules.
The information provided in this document is to be used solely as a resource and does not supersede the statute and/or rules for this program.

NEW: Statutes (TEC) and rules (TAC) periodically change and may affect the links referenced in this document. Copies of statutes and rules used to create these guidelines are available in Appendix 2.

PROGRAM AUTHORITY AND PURPOSE (19 TAC, SECTION 22.21)

Enhancements

Links to TEC and TAC Rules in each of the relevant section headings were added back.

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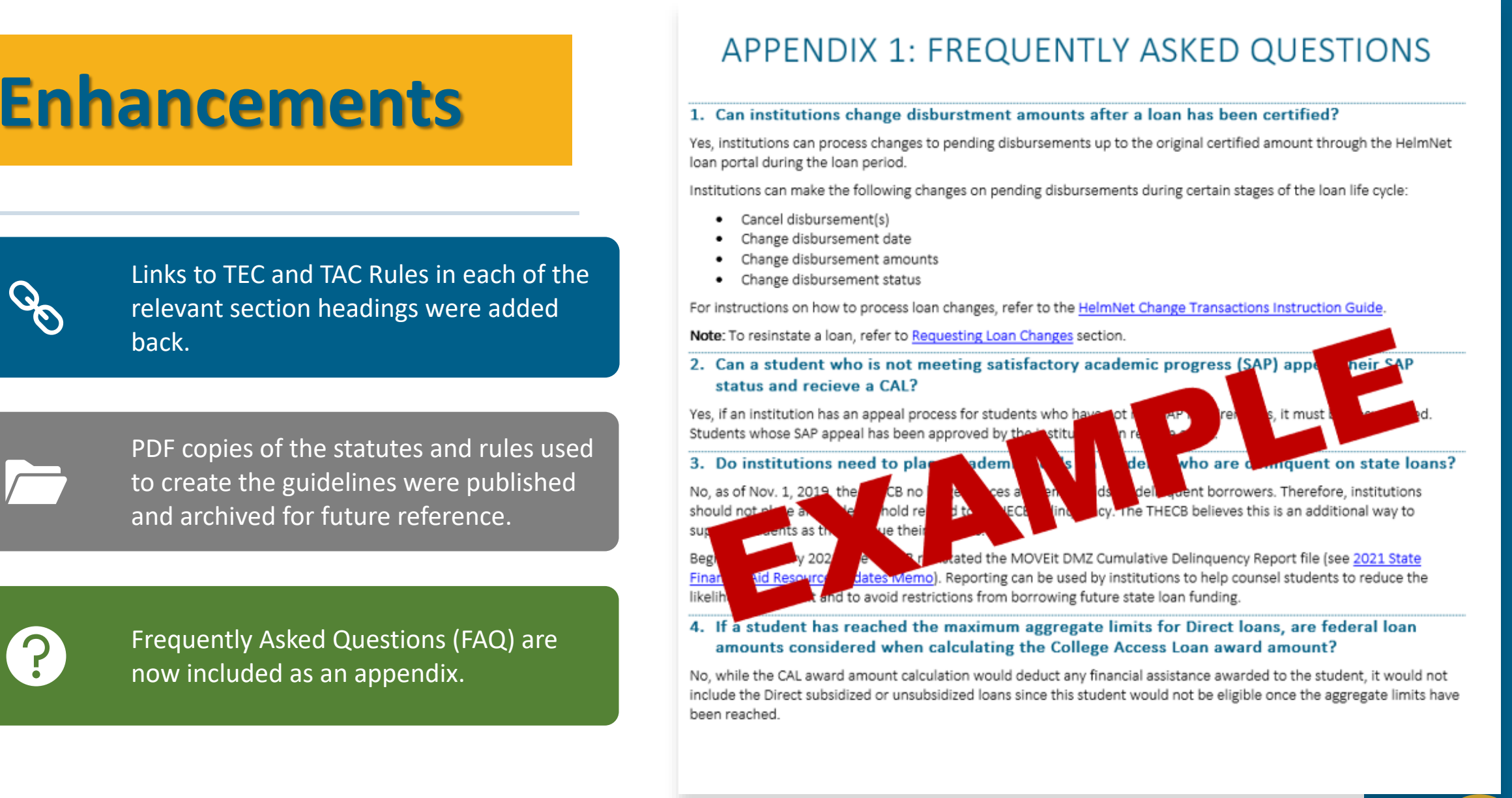


APPENDIX 1: FREQUENTLY ASKED QUESTIONS

1. Can institutions change disburstment amounts after a loan has been certified?

Yes, institutions can process changes to pending disbursements up to the original certified amount through the HelmNet loan portal during the loan period.

Institutions can make the following changes on pending disbursements during certain stages of the loan life cycle:

- Cancel disbursement(s)
- Change disbursement date
- Change disbursement amounts
- Change disbursement status

For instructions on how to process loan changes, refer to the HelmNet Change Transactions Instruction Guide.

Note: To resinstate a loan, refer to Requesting Loan Changes section.

2. Can a student who is not meeting satisfactory academic progress (SAP) appe… heir SAP status and recieve a CAL?

Yes, if an institution has an appeal process for students who hav… ot … AP … re… s, it must … d. Students whose SAP appeal has been approved by the …stitu… n re…

3. Do institutions need to pla… adem… s … de… who are d…inquent on state loans?

No, as of Nov. 1, 2019, the …CB no … es a… en… ds … del… quent borrowers. Therefore, institutions should not p… e a… le… hold re… d t… ECB … lin… cy. The THECB believes this is an additional way to su… dents as th… ue thei…

Beg… y 202… e … r… ated the MOVEit DMZ Cumulative Delinquency Report file (see 2021 State Finan… Aid Resourc… dates Memo). Reporting can be used by institutions to help counsel students to reduce the likelih… t and to avoid restrictions from borrowing future state loan funding.

4. If a student has reached the maximum aggregate limits for Direct loans, are federal loan amounts considered when calculating the College Access Loan award amount?

No, while the CAL award amount calculation would deduct any financial assistance awarded to the student, it would not include the Direct subsidized or unsubsidized loans since this student would not be eligible once the aggregate limits have been reached.

EXAMPLE

Program Rule Changes

The following changes made the greatest impact on the **2021-22 program guidelines**:

- The removal of the *PRORATION* requirement in all grant programs.
- The removal of the *OVER AWARD* and *AWARD ADJUSTMENT* criteria as it applies to Texas College Work-Study Programs.
- The addition of *AUTHORITY TO TRANSFER* as it applies to Texas College Work-Study (TCWS) and Work-Study Student Mentorship Program (WSMP).

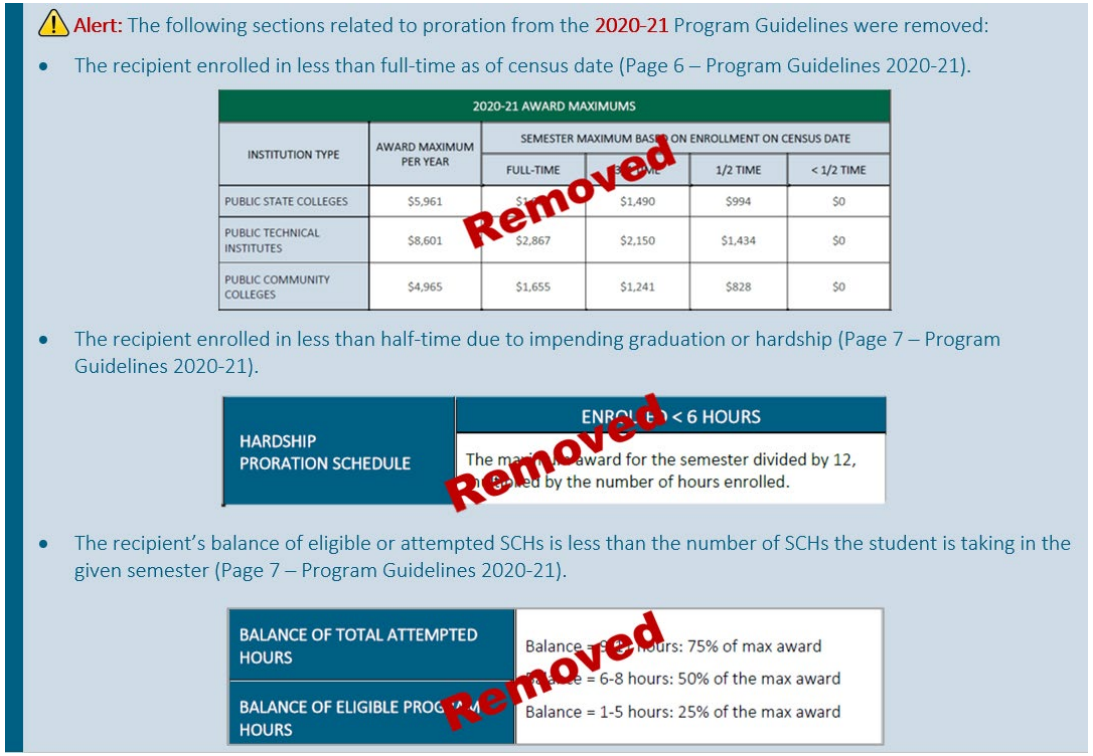
PRORATION REQUIREMENT REMOVED

In November 2020, provision pertaining to proration requirements were removed from the TEOG, TEXAS Grant and TEG program rules.

TEOG Proration

Institutions no longer have to prorate awards for students who:

- are enrolled less than 12 hours as of the census date
- are enrolled less than 6 hours due to hardship
- have a balance of less than 12 total attempted hours remaining
- have a balance of less than 12 eligible program hours remaining



⚠ **Alert:** The following sections related to proration from the 2020-21 Program Guidelines were removed:

- The recipient enrolled in less than full-time as of census date (Page 6 – Program Guidelines 2020-21).

2020-21 AWARD MAXIMUMS

INSTITUTION TYPE	AWARD MAXIMUM PER YEAR	SEMESTER MAXIMUM BASED ON ENROLLMENT ON CENSUS DATE			
		FULL-TIME	[illegible]	1/2 TIME	< 1/2 TIME
PUBLIC STATE COLLEGES	$5,961	$[illegible]	$1,490	$994	$0
PUBLIC TECHNICAL INSTITUTES	$8,601	$2,867	$2,150	$1,434	$0
PUBLIC COMMUNITY COLLEGES	$4,965	$1,655	$1,241	$828	$0

Removed

- The recipient enrolled in less than half-time due to impending graduation or hardship (Page 7 – Program Guidelines 2020-21).

HARDSHIP PRORATION SCHEDULE	ENROLLED < 6 HOURS
	The maximum award for the semester divided by 12, multiplied by the number of hours enrolled.

Removed

- The recipient's balance of eligible or attempted SCHs is less than the number of SCHs the student is taking in the given semester (Page 7 – Program Guidelines 2020-21).

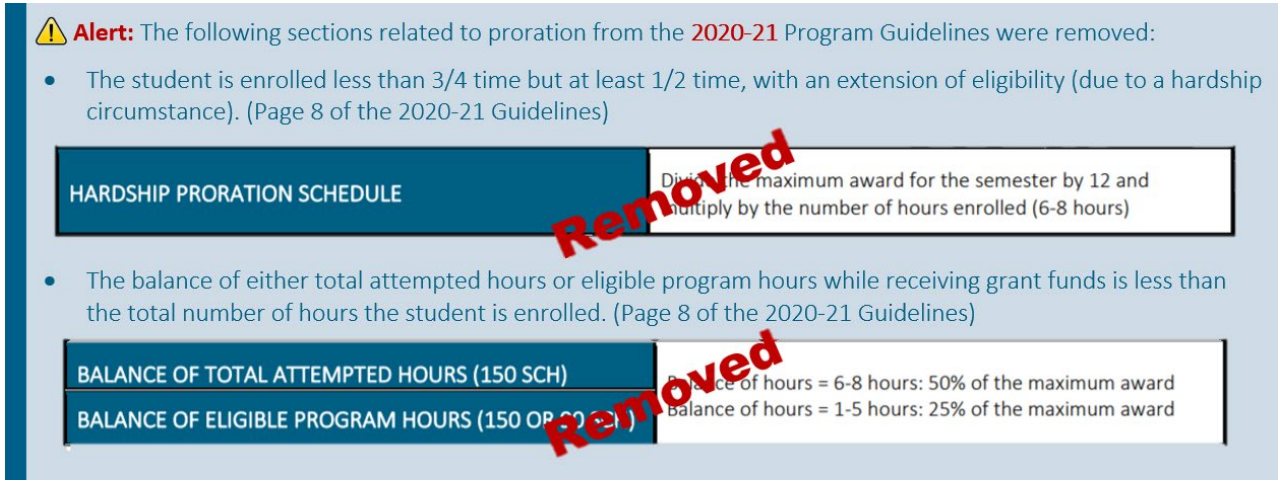
BALANCE OF TOTAL ATTEMPTED HOURS	Balance = 9-11 hours: 75% of max award Balance = 6-8 hours: 50% of the max award
BALANCE OF ELIGIBLE PROGRAM HOURS	Balance = 1-5 hours: 25% of the max award

Removed

TEXAS Grant Proration

Institutions no longer have to prorate awards for students who:

- are enrolled less than 9 hours due to hardship
- have a balance of less than 9 total attempted hours remaining
- have a balance of less than 9 eligible program hours remaining



Reminder: Students enrolled less than 6 hours CANNOT receive a TEXAS Grant award, regardless of the circumstances, including hardships.

TEG Proration

Institutions no longer have to prorate awards for students who:

- are enrolled less than ¾ time due to hardship

⚠ Alert: The following sections related to proration from the 2020-21 Program Guidelines was removed:

- Awards must be prorated if the student has been approved for an exception to the 3/4-time enrollment requirement due to a hardship circumstance.

UNDERGRADUATE HARDSHIP PRORATION SCHEDULE	ENROLLED 6-8 HOURS	ENROLLED < 6 HOURS
	50% of the maximum award amount	25% of the maximum award amount
GRADUATE HARDSHIP PRORATION SCHEDULE	ENROLLED 5-8 HOURS	ENROLLED < 5 HOURS
	50% of the maximum award amount	25% of the maximum award amount

Removed

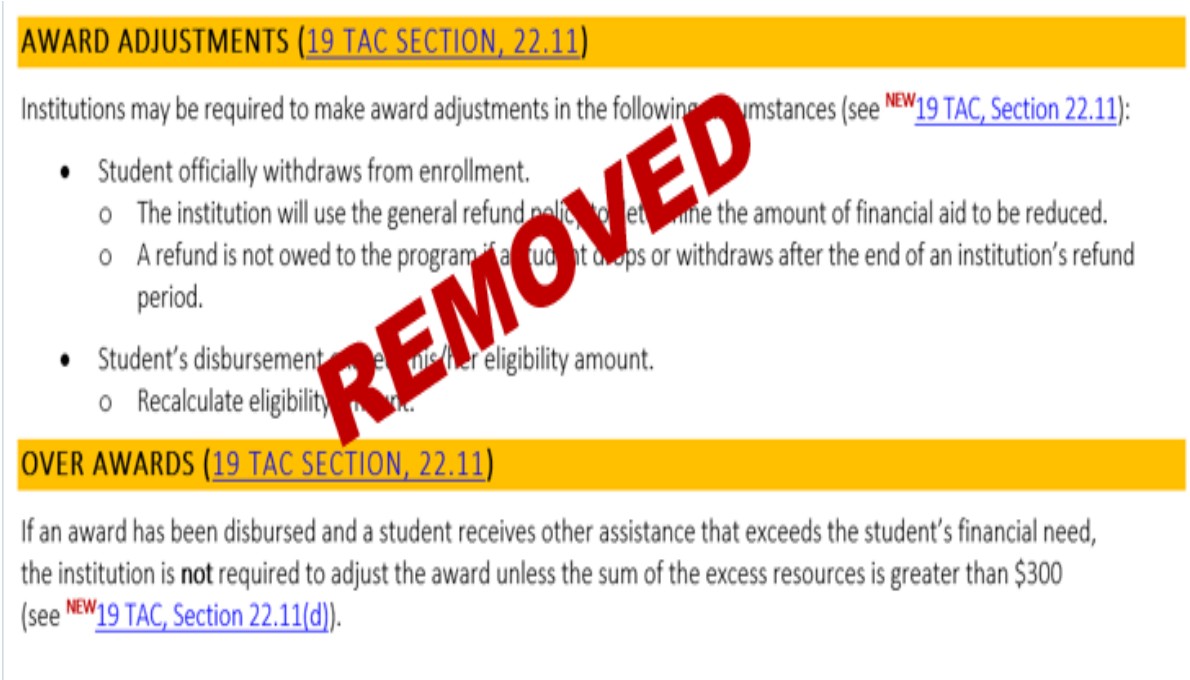
Award Adjustments and Over Awards Removed

In November 2020, TAC provisions pertaining to AWARD ADJUSTMENTS and OVER AWARDS were updated and no longer apply to Texas College Work-Study programs.

Rule Removal - TCWS and WSMP

- Language in 19 TAC, Section 22.11 (d) and (e) was updated to apply only to grant programs.

- Unlike state grant programs, work-study funds are paid based on hours earned and therefore awards are not eligible for adjustments.



Authority to Transfer Updated

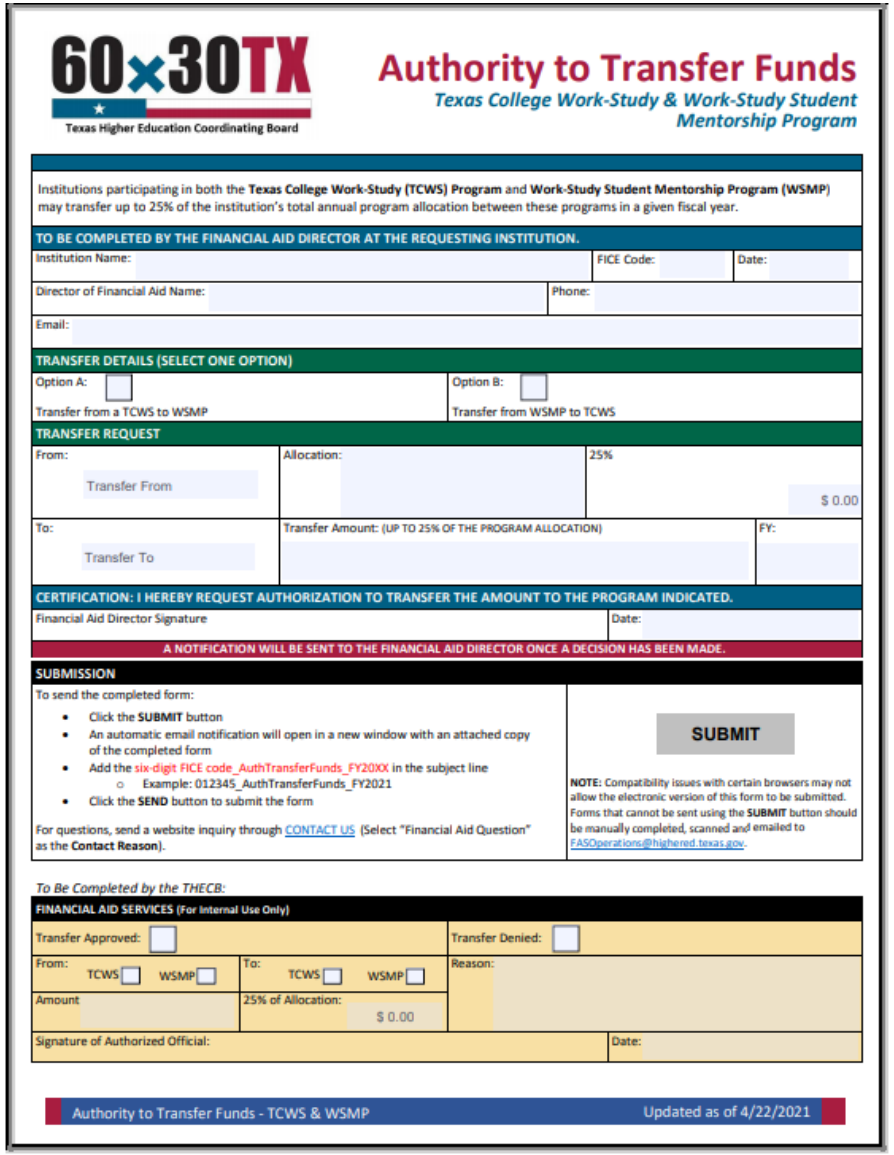
In November 2020, TAC provisions pertaining to AUTHORITY TO TRANSFER were updated for the Texas College Work-Study programs.

Authority to Transfer - TCWS & WSMP

Institutions participating in both the TCWS and WSMP may **NOW** transfer up to **25%** between the two programs.

To request a transfer form, institutions must submit a CONTACT US by **July 1, 2022**.

THECB staff will respond and provide next steps for this process.



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Texas Higher Education Coordinating Board

Authority to Transfer Funds
Texas College Work-Study & Work-Study Student Mentorship Program

Institutions participating in both the **Texas College Work-Study (TCWS) Program** and **Work-Study Student Mentorship Program (WSMP)** may transfer up to 25% of the institution's total annual program allocation between these programs in a given fiscal year.

TO BE COMPLETED BY THE FINANCIAL AID DIRECTOR AT THE REQUESTING INSTITUTION.

Institution Name: | FICE Code: | Date:

Director of Financial Aid Name: | Phone:

Email:

TRANSFER DETAILS (SELECT ONE OPTION)

Option A: ☐ Transfer from a TCWS to WSMP

Option B: ☐ Transfer from WSMP to TCWS

TRANSFER REQUEST

From: Transfer From | Allocation: | 25% $ 0.00

To: Transfer To | Transfer Amount: (UP TO 25% OF THE PROGRAM ALLOCATION) | FY:

CERTIFICATION: I HEREBY REQUEST AUTHORIZATION TO TRANSFER THE AMOUNT TO THE PROGRAM INDICATED.

Financial Aid Director Signature | Date:

A NOTIFICATION WILL BE SENT TO THE FINANCIAL AID DIRECTOR ONCE A DECISION HAS BEEN MADE.

SUBMISSION

To send the completed form:

- Click the **SUBMIT** button
- An automatic email notification will open in a new window with an attached copy of the completed form
- Add the six-digit FICE code_AuthTransferFunds_FY20XX in the subject line
  - Example: 012345_AuthTransferFunds_FY2021
- Click the **SEND** button to submit the form

For questions, send a website inquiry through CONTACT US (Select "Financial Aid Question" as the **Contact Reason**).

SUBMIT

NOTE: Compatibility issues with certain browsers may not allow the electronic version of this form to be submitted. Forms that cannot be sent using the **SUBMIT** button should be manually completed, scanned and emailed to FASOperations@highered.texas.gov.

To Be Completed by the THECB:

FINANCIAL AID SERVICES (For Internal Use Only)

Transfer Approved: ☐ | Transfer Denied: ☐

From: TCWS ☐ WSMP ☐ | To: TCWS ☐ WSMP ☐ | Reason:

Amount | 25% of Allocation: $ 0.00

Signature of Authorized Official: | Date:

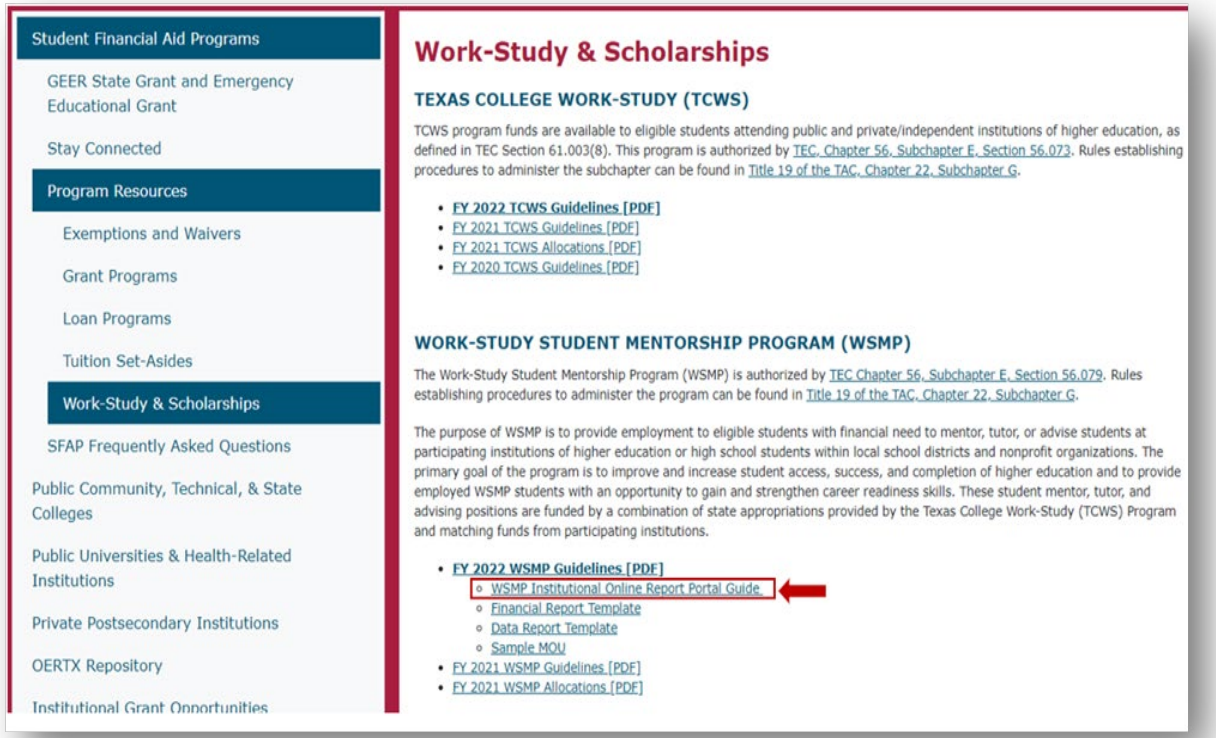
Authority to Transfer Funds - TCWS & WSMP Updated as of 4/22/2021

Work-Study Student Mentorship Program: New Reporting Process

WSMP Institution Online Report Portal

- The WSMP Institutional Online Report Portal is available starting with the **June 5** reporting cycle to submit the institution's required program reports and supplemental documents.

- Instructions for the **NEW** Online Portal can be found on the Student Financial Aid Programs webpage under Work-Study & Scholarships.



WSMP Institutional Online Report Portal Guide

Requesting Access to the WSMP Report Portal

1. Log into your CBPass Account.
2. Click on My Access tab.
3. Click Request Access to another application.
4. Select Work-Study Mentorship.
5. Click Request Access.

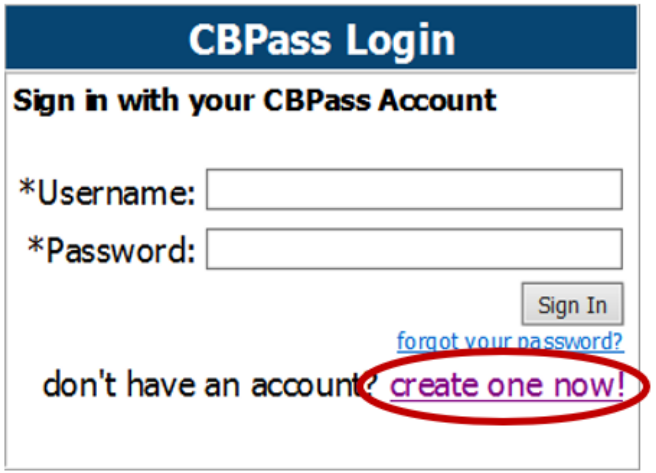
Once approved, you will receive an email notification.

CBPass registration steps for those who do not currently hold an account:

1. Access the CBPass login page:

   https://www1.thecb.state.tx.us/CBPass/

2. Click on the **create one now** link.



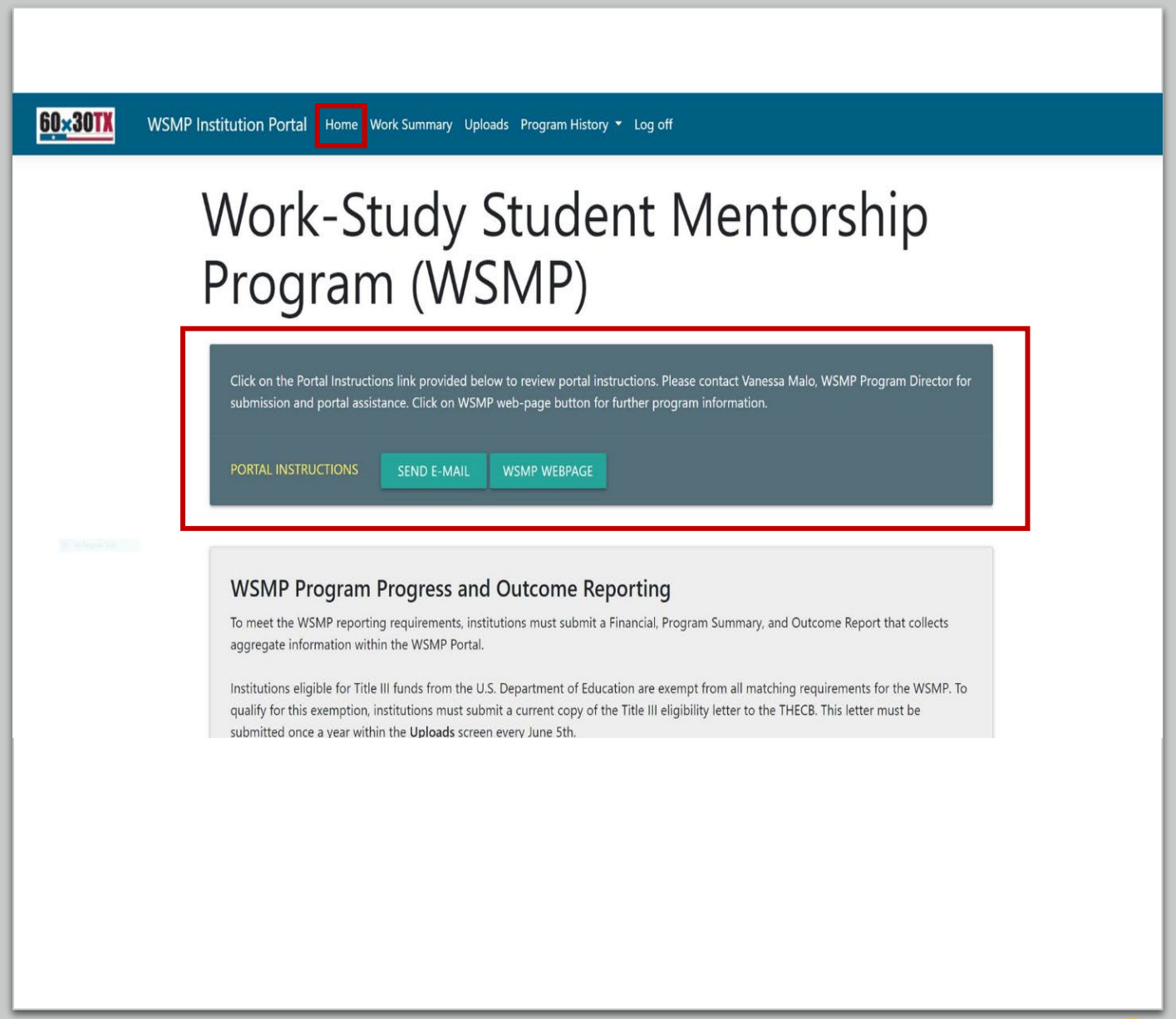
3. The CBPass – New User Registration page displays.

USERS MUST HAVE CBPASS ACCOUNT

Home Page

The WSMP **Home Page** includes the following resources to ensure the appropriate reports are submitted based on the scheduled deadlines:

- Click **PORTAL INSTRUCTIONS** for step-by-step instructions.
- Click **SEND EMAIL** to direct questions to THECB.
- Click the **WSMP WEBPAGE** link for additional information and program guidelines.

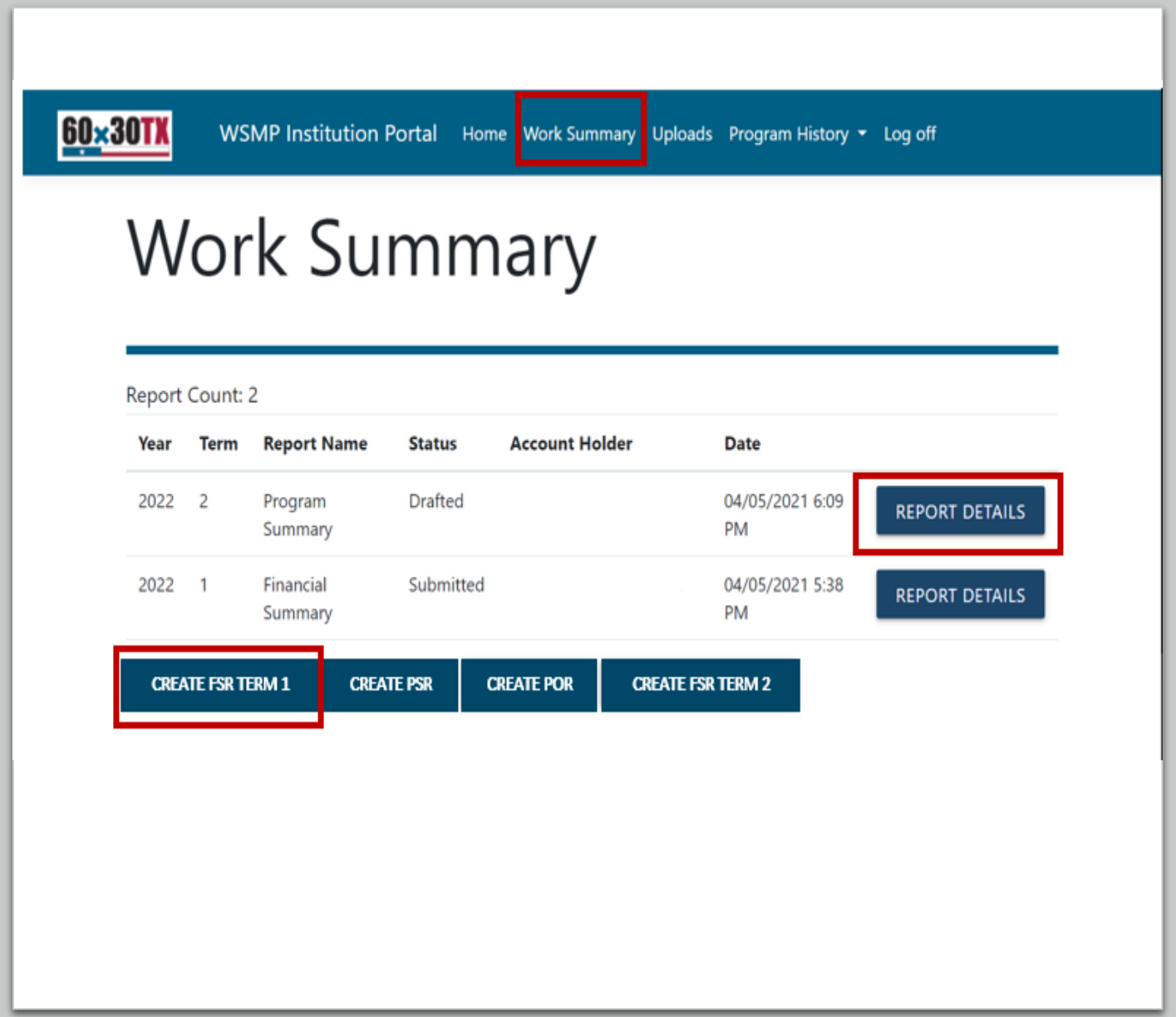


Work Summary

To submit a report, click on the **Work Summary** at the top of the screen and select the applicable report.

The following reporting are available on the Work Summary Tab:

- **FSR Term 1** - Financial Summary Report (September – May)
- **PSR Term 2** - Program Summary Report (September – August)
- **POR Term 2** - Program Outcome Report (September – August)
- **FSR Term 2** - Financial Summary Report (September – August)



Remaining Balance

$1,000.00

To be expended by end of biennium received and to be updated as needed. Any changes are to be noted in the report comment section.

Allocation Amount

$50,000.00

If Applicable, Include updated amount.

Returned Funds

$500.00

Provide if applicable and impacts report final totals.

Transfer Amount to a State Grant Program

(TEXAS Grant,TEOG,TEG) or to the Texas College Work-Study Program

Total Available Funds

$50,500.00

Total Eligible Students Employed (To-date)

25

Total Earned Student Wages

$20,500.00

Institution Match

The match is 10% of earned wages. Required if Title III eligibility letter not

Total for Financial Aid Database

$20,500

This total is to be submitted into FAD based on the amounts entered within the total

Comments

Optional - The purpose of the comment section is to provide program updates, new team contact information, return fund explanation, and submission clarifications.

Title III Eligibility Waiver

Instructions: Institutions eligible for Title III funds from the U.S. Department of Education are exempt from all matching requirements for the WSMP. To qualify for this exemption, institutions must submit a current copy of the Title III eligibility letter to the THECB.

Do you have a current copy of the Title III eligibility letter? Click yes or no in the drop-down option. If yes, please submit a copy of the letter to the UPLOADS TAB.

I affirm that the financial summary report has been reviewed and confirmed accurate by the Financial Aid Director, Project Director, and Program Fiscal Authority. I affirm that the employed students are eligible to be employed by the WSMP in accordance with Financial Aid Texas Work-Study Eligibility regulations and are enrolled within your institution.

Please sign below:

SUBMIT TERM 1 | PRINT | SAVE

Program Outcomes

Instructions: Program outcomes are submitted once a year (September 5th). Institutions will provide the persistence data of students served this year. Please complete each section. Any data that you are not able to provide, please make a note in the comment section and provide an explanation.

The Program Outcomes Report has a save while in the draft feature. Please press the save button as work is being completed to ensure work is not lost. After fifteen minutes, the system will automatically log out.

You will be able to click on the Program History tab at the top of the page to be able to see, print, and save submitted reports. If there are any questions or concerns while the report is under review, you will be notified by the WSMP THECB Program Director and next steps will be provided at that time.

Secondary Outcomes

Please provide the persistence data of students served this year within the section provided below. The data provided will be based off of total students served unduplicated.

Any data that you are not able to provide enter zero and provide a note with an explanation in the comment section.

Total Students Served Unduplicated

Persisted the First Year to Sophomore Year

Persisted Sophomore Year to Junior Year

Persisted Junior Year to Senior Year

Graduated

Program Summary

Instructions: Program summaries are submitted once a year. WSMP requires MOUs to be in place with WSMP partnering school districts or nonprofit organizations. MOUs must be provided to the Coordinating Board, should clearly state the agreement period, and state with whom the agreement is with. An MOU sample template is provided within the WSMP Guidelines and within the MOU upload section of this report screen.

The Program Summary Report has a save while in the draft feature. Please press the save button as work is being completed to ensure work is not lost. After fifteen minutes, the system will automatically log out.

You will be able to click on the report history tab at the top of the screen to be able to see, print, and save submitted reports. If there are any questions or concerns while the report is under review, you will be notified by the WSMP THECB Program Director and next steps will be provided at that time.

Once you have completed the program summary report, please move forward, and complete the additional program outcome report (persistence of students served).

Program Structure and Students Served

Required

Type of Position Employed / Service Provided

Total Served

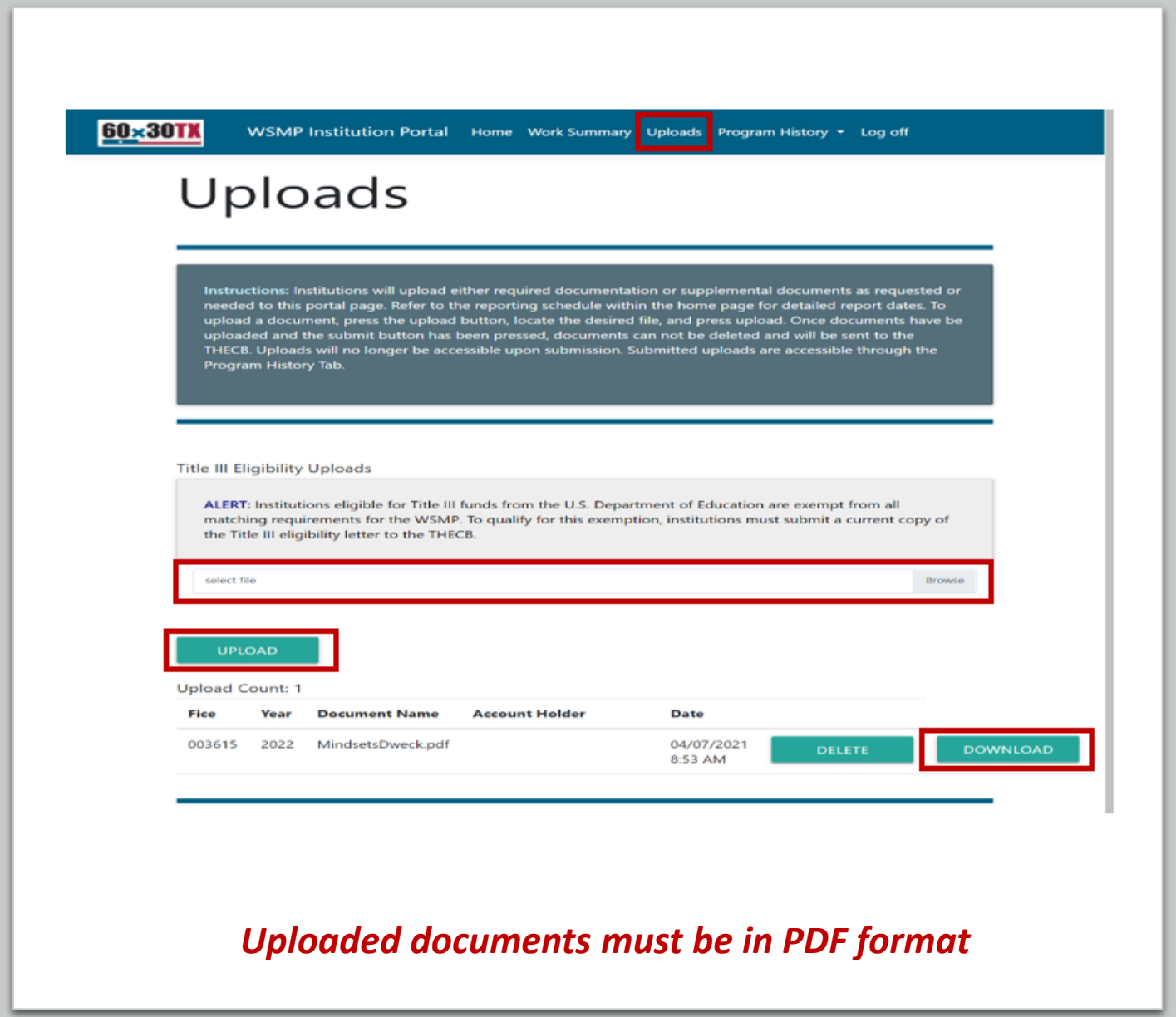
Uploads

The **Upload Tab** allows required or supplemental documents to be submitted.

To upload a document, click the Browse button, select the desired PDF file, and click **UPLOAD**. To view the file uploaded, click on the **DOWNLOAD** button. Once it's ready to submit to the THECB, click **SUBMIT** at the bottom of the screen.

Possible Supplemental Documentation:

- **Title III funds letter** from the U.S. Department of Education.
- Memorandum of Understanding (MOU) with **off-campus** entity.
- Any additional documents to share program accomplishments.



Uploaded documents must be in PDF format

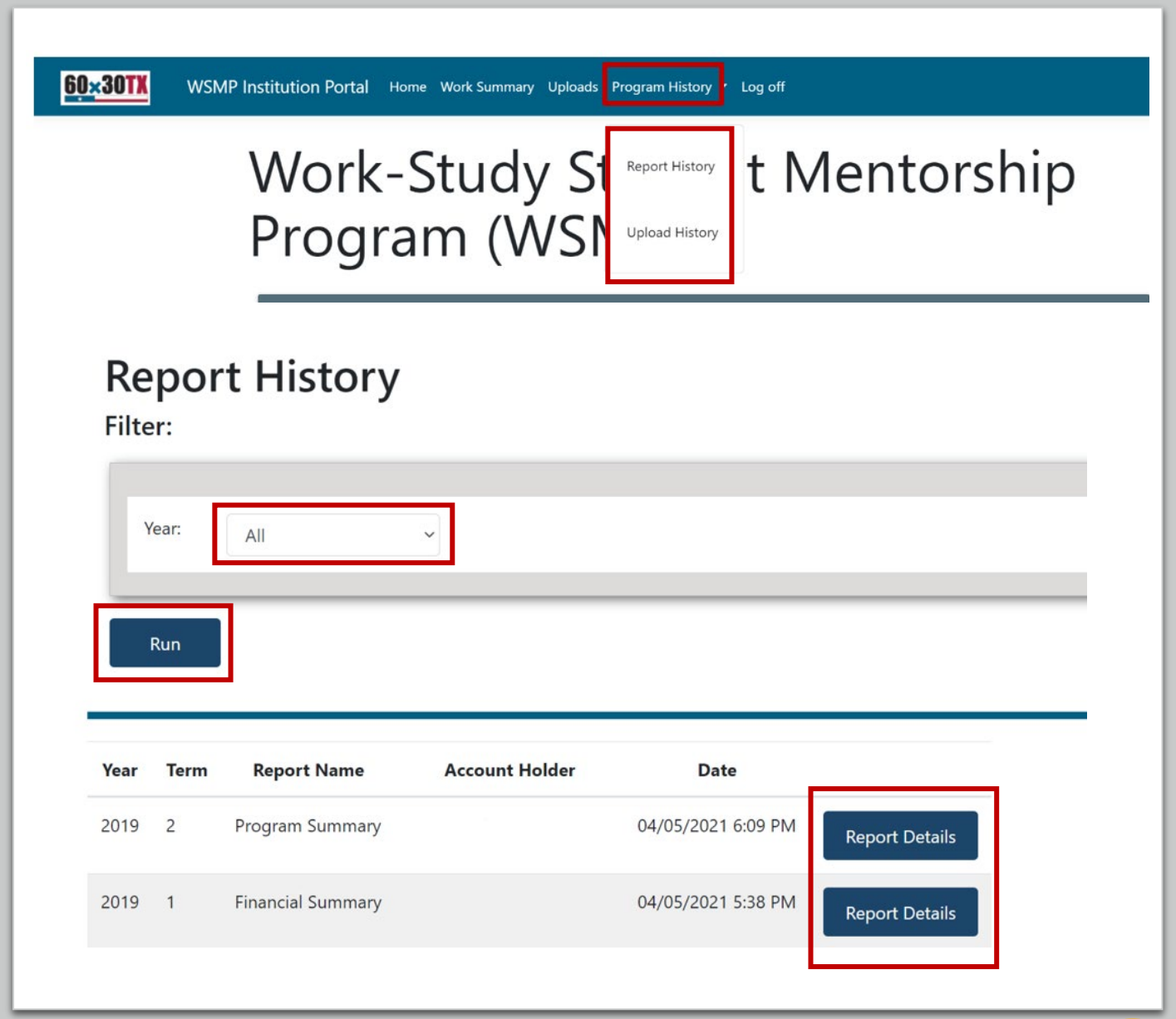
Program History

The **Program History Tab** is available to view previously submitted reports or uploaded documents by year.

1. Click on the **Program History** dropdown and select the desired report:
    - Report History
    - Upload History

2. Search for **Report History** by year.

3. Click **Run** and then **Report Details** to view previously submitted information.



Updates, Training and Deadline Reminders

Updates

2020-21 Authority to Transfer – Deadline Jul. 1, 2021

- Up to 100% of Work-Study (TCWS and WSMP) → Grant program **(2020-21 only)**
- Up to 10% or $20,000 (which ever is less) of Grant → Work-Study (TCWS and WSMP)
- Up to 25% between Work-Study Programs (TCWS and WSMP)

2020-21 Allocations

- 10-day data review – Coming Soon!!
- Final allocations – provided after legislative session ends

2020-21 Good Neighbor Program

- Selected students were emailed to program officials on **May 6, 2021**.

Training

- Next Monthly Webcast – **June 15, 2021**

Deadline Reminders

- TEG Engagement Report – Apr. 15, 2021
- Net Price Calculator – Apr. 16, 2021
- Financial Aid Database Cycle One – Apr. 23, 2021

Questions