

Texas Higher Education Coordinating Board

Student Financial Aid Programs

Webcast

September 14, 2021

TOPICS OF DISCUSSION



Accessing Systems

Requesting and Returning Funds

Reviewing Online Resources

How to Contact Us

Reminders and Training

Accessing Systems

System Access - Secure Web Portals

MOVEit DMZ

Secure transfer of data and reports

<https://dsv.thecb.state.tx.us/>

- FAD processing
- Award History File Results
- Loan disbursement rosters and delinquency reporting
- Net Price Calculator upload

HelmNet

Borrower and Institutional Portal

<https://helmnet.thecb.state.tx.us/>

- College Access Loan (CAL)
- Texas Armed Services Scholarship Program (TASSP)
- Reporting and Management tools

CBPASS

Access State Aid Software Apps

create one now!'."/>

<https://www1.highered.texas.gov/CBPass/default.cfm>

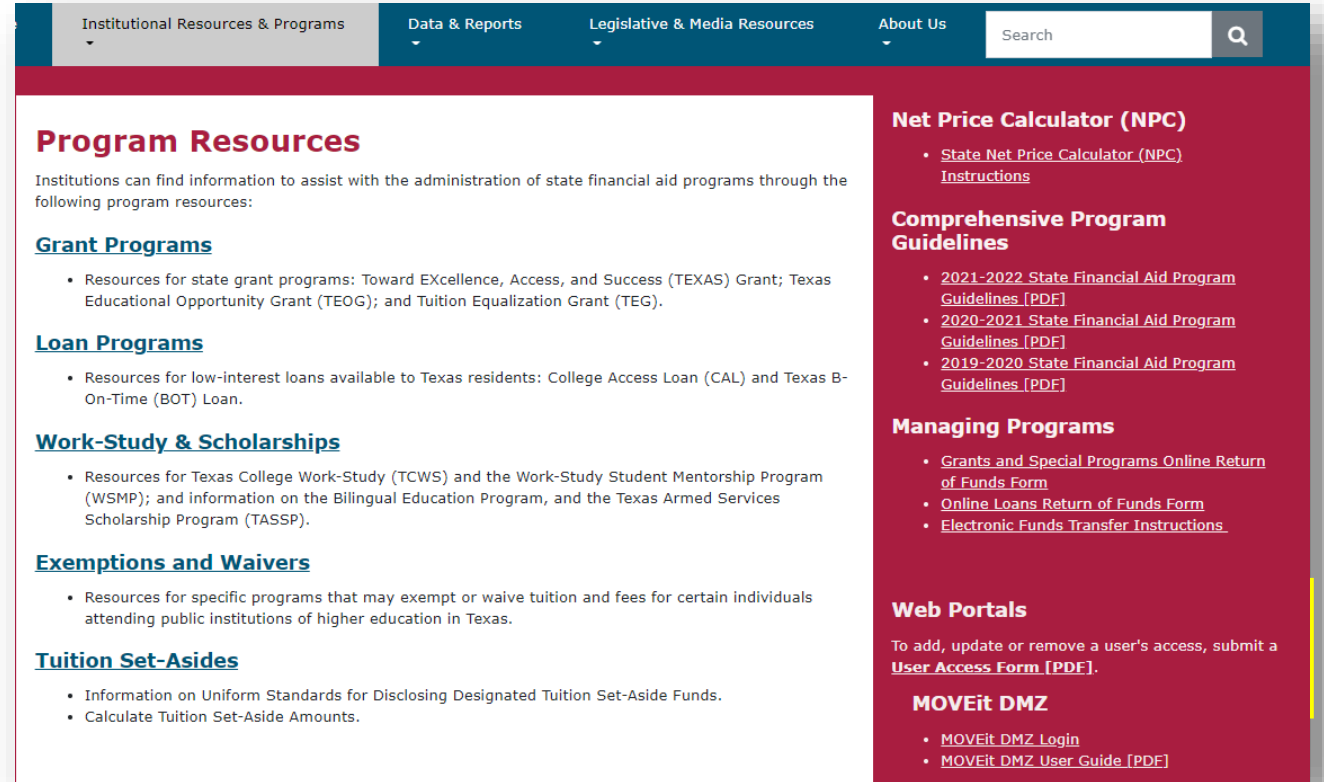
- Grant Payment Portal
- Award History Manual Lookup
- FAD Validation and Certification
- Good Neighbor Program Recommendation Form

User Access for Secure Portals

Tips and Reminders:

- User Access form is located on the right-hand banner on most SFAP pages
- To gain access to CBPASS, a user will need to start by setting up their own account and requesting access to a specific application.

NOTE: The annual User Access review process is coming up soon so prepare by cleaning up your accounts using the online form.



The screenshot displays the Texas Higher Education Coordinating Board website. The top navigation bar includes links for Institutional Resources & Programs, Data & Reports, Legislative & Media Resources, and About Us, along with a search bar. The main content area is titled 'Program Resources' and lists several categories of resources: Grant Programs, Loan Programs, Work-Study & Scholarships, Exemptions and Waivers, and Tuition Set-Asides. A right-hand banner contains links to the Net Price Calculator (NPC), Comprehensive Program Guidelines, Managing Programs, and Web Portals.

Program Resources
Institutions can find information to assist with the administration of state financial aid programs through the following program resources:

- Grant Programs**
 - Resources for state grant programs: Toward EXcellence, Access, and Success (TEXAS) Grant; Texas Educational Opportunity Grant (TEOG); and Tuition Equalization Grant (TEG).
- Loan Programs**
 - Resources for low-interest loans available to Texas residents: College Access Loan (CAL) and Texas B-On-Time (BOT) Loan.
- Work-Study & Scholarships**
 - Resources for Texas College Work-Study (TCWS) and the Work-Study Student Mentorship Program (WSMP); and information on the Bilingual Education Program, and the Texas Armed Services Scholarship Program (TASSP).
- Exemptions and Waivers**
 - Resources for specific programs that may exempt or waive tuition and fees for certain individuals attending public institutions of higher education in Texas.
- Tuition Set-Asides**
 - Information on Uniform Standards for Disclosing Designated Tuition Set-Aside Funds.
 - Calculate Tuition Set-Aside Amounts.

Net Price Calculator (NPC)

- [State Net Price Calculator \(NPC\) Instructions](#)

Comprehensive Program Guidelines

- [2021-2022 State Financial Aid Program Guidelines \[PDF\]](#)
- [2020-2021 State Financial Aid Program Guidelines \[PDF\]](#)
- [2019-2020 State Financial Aid Program Guidelines \[PDF\]](#)

Managing Programs

- [Grants and Special Programs Online Return of Funds Form](#)
- [Online Loans Return of Funds Form](#)
- [Electronic Funds Transfer Instructions](#)

Web Portals
To add, update or remove a user's access, submit a [User Access Form \[PDF\]](#).

MOVEit DMZ

- [MOVEit DMZ Login](#)
- [MOVEit DMZ User Guide \[PDF\]](#)

User Access for Secure Portals

Tips and Reminders:

- The form can be used to:
 - Update a new director
 - Add or update a user for MOVEit DMZ or HelmNet
 - Remove a user for MOVEit DMZ, HelmNet or CBPASS
- New FA Directors will be issued a new password for MOVEit DMZ which must be re-shared with other users that access the portal.

60x30TX
Texas Higher Education Coordinating Board

User Access to Web Portals
To Be Completed by Director of Financial Aid

Purpose

The purpose of this form is to provide the requirements in which an institution may:

- Request, remove, and update credentials for the **Higher Education Loan Management System (HelmNet)**.
- Remove application access to the Grant Payment Program (GPP), Financial Aid Database (FAD), and the Good Neighbor Program (GNP) within the **Coordinating Board Identification (CBPass)** web portal.
- Update authorized **MOVEit DMZ** designees.

Requirements

Institutions must implement procedures to ensure that only authorized staff have access to the THECB secure web portals.

- Users are responsible for protecting the confidentiality of their usernames and passwords.
- User credentials for **CBPass** applications and **HelmNet** must be removed using this form whenever access is no longer needed (e.g., a role change, or a staff member's departure).
- Updates to contact information, such as a change in name, title, or email, must be made to a user's profile.
 - Changes to a user's profile in **CBPass** are made via the CBPass web portal.
 - Changes to a user's profile in **HelmNet** are made via this form.
- **MOVEit DMZ** is managed solely by the Director of Financial Aid, and institutions are issued only one ID and password. New directors are automatically designated the *Authorizing Official* of MOVEit DMZ. Directors are required to update the system password each time a new designee is assigned, a designee position no longer requires portal access, or a designee no longer works in the department or at the institution. Directors are required to assign *at least one* designee.

Institution Contact Information		
Institution Name:		FICE Code:
Certifying Official (Director of Financial Aid or equivalent)		
First Name:	Last Name:	Phone:
Title:		Email:

☐ Check box when a **NEW or Interim** Director is completing this form.

When the above box is checked, the THECB will remove the prior Director's access to all portals and automatically issue a new MOVEit DMZ password for security purposes.

Institution Authorization	
I certify that _____ shall implement procedures to ensure that only authorized users under this agreement have access to HelmNet, CBPass, and MOVEit DMZ web portals. I further understand that if a user no longer requires access, I will take the necessary measures to remove their access.	
Certifying Official Signature: _____	Date: _____

As of 08/21/2020 1 | Page

Requesting and Returning Funds

Grant Payment Portal (GPP) – *Requesting* Funds

(TEXAS Grant, TEOG, TEG)

Tips and Reminders:

- FY 2022 allocations are available but the additional funds under Strategy B.1.10 are not loaded in GPP yet.
- Only request the funds that can be paid to a student's account within 3 business days of receiving the funds ([TAC Title 19, Chapter 22, Rule 22.2](#)).
- Instructions are located at the bottom of the page in GPP to assist with adjusting student count or funding changes.

60x30TX Grant Payment Process - Institution Home Transaction Details Request Funds Return Funds Awards History Log off

FICE: Awards History - TEXAS Grant | Awards History - TEOG | Awards History - TEG
FICE Name:

Request Funds

Total Allocation: \$50,000.00 Total Allocation Amount Remaining: \$24,978.00

Appropriation Year: 2021
Program Type: TEOG
* Request Amount: \$
* Request Amount: Do not include special characters.
* Student Count:

Back to Home Submit Request

*** Student Count:**

- If requesting funds for new students via the current request: Update the "request amount" field. The "student count" field must include the distinct number of student awards being funded via the current request.
- If requesting funds with no change to the total student count: Update the "request amount" field and the "student count" field must reflect zero (0).
- If no funds are being requested and the total student count requires increasing: Update the "request amount" field to reflect zero (0). The "student count" field must be used to update only the total number of students to increase.

Please note: If decreasing the student count, use the "Return Funds" on the menu bar.

Grant Payment Portal – *Returning* Funds

(TEXAS Grant, TEOG, TEG)

Tips and Reminders:

- State grant aid that is ineligible can be given to a different eligible student in order to meet the timely disbursement requirement ([TAC Title 19, Chapter 22, Rule 22.2](#)).
- It's important to use the **Return Funds** function in GPP while also coordinating the refund with the business office to ensure the amount returned is sent concurrently and that the totals match.

The screenshot shows the 'Return of Funds' form in the Grant Payment Process - Institution portal. The form is titled 'Return of Funds' and shows a 'Pending Return: \$0.00'. The form fields include: Appropriation Year (2021), Program Type (TEOG), * Amount Returned (with a dollar sign prefix and a note 'Do not include special characters'), * Student Count, and * Comments (with a 200 character limit). Below the form are 'Back to Home' and 'Submit Return' buttons. A red asterisk indicates a required field for 'Student Count'. A detailed note explains the requirements for updating the student count and request amount, including instructions for partial returns, no change, and decreasing the student count. A final note states that if the student count is increased, the 'Request Funds' function should be used.

60x30TX Grant Payment Process - Institution Home Transaction Details Request Funds Return Funds Awards History Log off

FICE: Awards History - TEXAS Grant | Awards History - TEOG | Awards History - TEG
FICE Name:

Return of Funds

Pending Return: \$0.00

Appropriation Year: 2021

Program Type: TEOG

* Amount Returned: \$
* Amount Returned: Do not include special characters.

* Student Count:

* Comments:
200 character(s) left.

Back to Home Submit Return

* Student Count:

- If returning funds and adjusting total student count: Update the "request amount" and the "student count" field must include the distinct number of student awards being returned (Do not update the student count for a partial return).
- If funds are being returned and there is no change to the total student count: Update the "request amount" field and the "student count" field must reflect zero (0).
- If no funds are being returned and the total student count requires decreasing: Update the "request amount" field to reflect zero (0). The "student count" field must be used to update only the total number of students to decrease.

Please note: If increasing the student count, use the "Request Funds" on the menu bar.

NOTE: Do not include cents (whole dollars only).

CAL/TASSP – *Requesting* Funds

Tips and Reminders:

- CAL is student-initiated.
- TASSP is initiated by school.
- Disbursements are driven by when the student acknowledges their Loan Approval Disclosure (LAD) online.
- Reports can be run in HelmNet to monitor CAL and TASSP activity.
 - Instructions are available on SFAP webpage under Loans page.

Manual certification via HelmNet

Loan Programs

School Certification

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
ZIP	78781

Enrollment Information

Grade Level	Select a Grade Level
Enrollment Status	Select an Enrollment Status
Academic loan period	08/24/2016 to 05/17/2017
Anticipated Graduation Date	__/__/__

Manage Loan Programs

- [Return of Funds Forms](#)
- [FAQ](#)
- [Loan Requirements](#)
- [Loan Transfer Instructions](#)
- [Remove a user's access, submit a request \[PDF\]](#)
- [Login](#)
- [User Guide \[PDF\]](#)
- [HLOANS\)](#)
- [HLOANS\) Login](#)
- [Loan Transactions Instructions](#)
- [Reporting Manual \[PDF\]](#)

CAL/TASSP - *Returning* Funds

Tips and Reminders:

- Look up the corresponding CAL/TASSP in HelmNet to complete the return of funds form.
- Make sure the correct information is entered on the form (i.e., Commonline ID, SSN, Disb # must match THECB database to return to the student's account).
- Coordinate with the business office to ensure the funds are sent with the form to avoid reconciliations delays.

Return of Funds Form (RFF)

College Access Loan (CAL), B-on-Time (BOT),
Texas Armed Services Scholarship Program (TASSP).

The amount on the RFF must correspond with the individual refunds submitted. For example, if funds for CAL, BOT, and TASSP are all being returned, three separate RFFs will need to be submitted and three refunds should be processed.

Date: 09-13-2021		FICE Code: <input type="text"/>		Institution: <input type="text"/>	
Contact Information					
Position	Name	Email	Phone		
Financial Aid Director	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Reporting Official	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Business Office Contact	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Program --- Select A Program Type ---			Total refund: <input type="text"/>	PCA# <input type="text"/>	
Disbursement Year: Calendar year the funds were disbursed Term: F = Fall S = Spring SM = Summer Award: F = Full P = Partial Explanation: INST Canceled = Institution Initiated Cancellation STDNT Canceled = Student Initiated Cancellation					

Common Line Unique ID	Disb. #	Disb. Year	Term Fall Spring	Amount (Include all Fees)	Award	First Name	Last Name	D.O.B MM/DD/YYYY	SSN 000000000	Explanation
	<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>					<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>					<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>					<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>					<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>					<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>					<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>					<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>					<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>					<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>					<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>					<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>					<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>					<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>					<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>					<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>					<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>					<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>					<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>					<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>					<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>					<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>					<input type="checkbox"/>

Special Programs - *Requesting* Funds

(EAE, Bilingual Education, TCWS)

Tips and Reminders:

- Educational Aide Exemption and Bilingual must be requested using a specific Funds Request Form.
 - Instructions are linked to the form.
- Texas College Work-Study - No Action Needed!!
 - Funds are sent as a lump sum payment after the start of the fiscal year.

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.

Institutions of higher education, as defined by [TEC, Chapter 61, Subchapter A](#), that administer the subchapter can be found

- [FY 2022 TASSP Guidelines](#) [PDF]
- [FY 2021 TASSP Guidelines](#) [PDF]
- [FY 2020 TASSP Guidelines](#) [PDF]

Texas Higher Education Coordinating Board

2021-22 (FY 2022)
Bilingual Education Program
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		
Bilingual Education Program	Current amount being requested.	Number of unique student awards being funded via current request. *

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. ***

* 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 [Fund 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_Bilingual Education Funds Request Form FY 2022
- Click the **SEND** button to email the form.

• [HelmNet Online Reporting Manual](#) [PDF]

Scholarship Consanguinity or

By submitting this form, I certify that the amounts reported on this request form are accurate as of today's date. I further understand the importance of the accuracy of this information, as it may be reported to the Texas Legislature and is subject to review during a program audit.

Certifying Name and Title

Signature _____ Date _____

☐ I confirm that this is an original (not a duplicate) submission.
☐ I confirm that this is a revised request; below is the date of the original submission and the reason for the revision.

Date of Original Submission: _____

Enter the explanation for the revised form here.

Submit

Forms that cannot be sent using the SUBMIT button should be manually completed, scanned, and emailed to FASOperations@highered.texas.gov


Special Programs - *Returning* Funds

(EAE, Bilingual Education, TCWS)

Tips and Reminders:

- Make sure all institutional contact information is included in the event follow up is needed.
- Provide a detailed refund explanation for audit and compliance purposes.

NOTE: This form can be used to return grants for anything prior to FY 2020.



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Return of Funds Form (RFF)
Educational Aide Exemption (EAE), Top Ten Percent (Top 10%) Scholarship, Texas College Work Study (TCWS), State Grant Programs, Bilingual Education Programs and Work-Study Student Mentorship (WSMP).

The amount on the RFF must correspond with the individual refunds submitted. For example, if funds for TEXAS Grant, TEOG, and TCWS are all being returned, three separate RFFs will need to be submitted and three refunds should be processed.

Date: 09-13-2021	FICE Code: <input type="text"/>	Institution: <input style="width: 90%;" type="text"/>
Contact Information		
Position	Name	Phone
Financial Aid Director	<input style="width: 80%;" type="text"/>	<input style="width: 20%;" type="text"/>
Reporting Official	<input style="width: 80%;" type="text"/>	<input style="width: 20%;" type="text"/>
Business Office Contact	<input style="width: 80%;" type="text"/>	<input style="width: 20%;" type="text"/>
Award Year: --- Select Award Year ---		
Program: --- Select A Program Type ---		
Grant programs require a breakdown in type of funds.		
Grant Program		Detailed Refund Explanation Required
Type of Funds	Amount*	
Initial	<input style="width: 80%;" type="text"/>	
Renewal	<input style="width: 80%;" type="text"/>	
Total	<input style="width: 80%;" type="text"/>	
Special Program		
Amount*	Number student awards being refunded**	
<input style="width: 80%;" type="text"/>	<input style="width: 20%;" type="text"/>	
Summary		
Award Year	--- Select Award Year ---	
Program/PCA	--- Select A Program Type ---	
Amount	<input style="width: 90%;" type="text"/>	
Total Student Count	<input style="width: 90%;" type="text"/>	

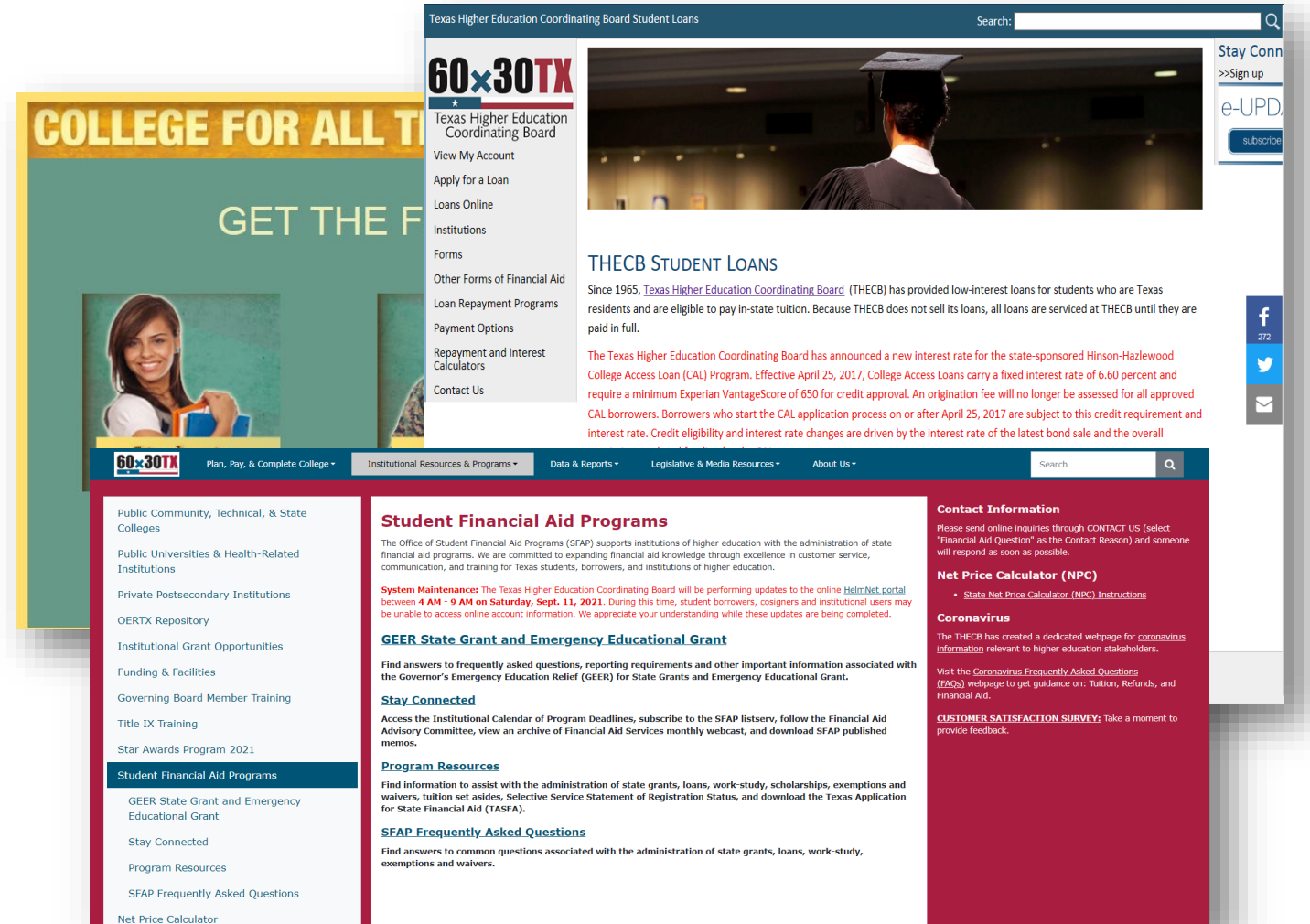
Reviewing Online Resources

THECB Websites

CollegeForAllTexans.com

HHLoans.com

HigherEd.Texas.gov



College For All Texans

Student Resources

Basic eligibility requirements for:

- State Grants & Scholarships
- Loan Programs
- Exemption & Waiver Programs
- Texas College Work-Study Program

TASFA & Instructions

State Net Price Calculator




CollegeForAllTexans.com

HHLoans


- CAL and TASSP eligibility information
- Account access for CAL and TASSP
- Forms (i.e., postponements, discharge, forgiveness)
- Loan Repayment Assistance Program (LRAP) information

Student Resources



Texas Higher Education Coordinating Board

- View My Account
- Apply Online
- Forms - Loan and Scholarship Programs
- Other Forms of Financial Aid
- Loan Repayment Programs
- Payment Options
- Contact Information
- COVID-19 Information



LOAN AND SCHOLARSHIP PROGRAMS THE TEXAS HIGHER EDUCATION COORDINATING BOARD OFFERS

System Maintenance

Texas Higher Education Coordinating Board will be performing system maintenance on our [Customer Portal website](#) beginning Saturday, September 11th, 2021 at 4:00 am through 9:00 am. During this time, customers may be unable to access their online account information, initiate loan applications, or to make payments to their account. We apologize in advance for any inconvenience this may cause.

College Access Loan Interest Rate Reduction

Any College Access Loan (CAL) application that is certified by a participating institution **on or after July 1, 2021** will carry a fixed interest rate of **3.75%**. To ensure the lower interest rate is received, it's recommended that applicants submit a CAL application **on or after July 1, 2021**.

Tax Information

Tax information regarding loan interest paid (Form 1098-E) and any loan debt forgiven (Form 1099-C) will be mailed to borrowers by January 31, 2021. Texas B-On-Time borrowers will receive a 1099-C statement for each loan forgiven. After January 31, 2021,

Stay Connected

[Sign up](#)

e-UPDATES

[subscribe to updates](#)

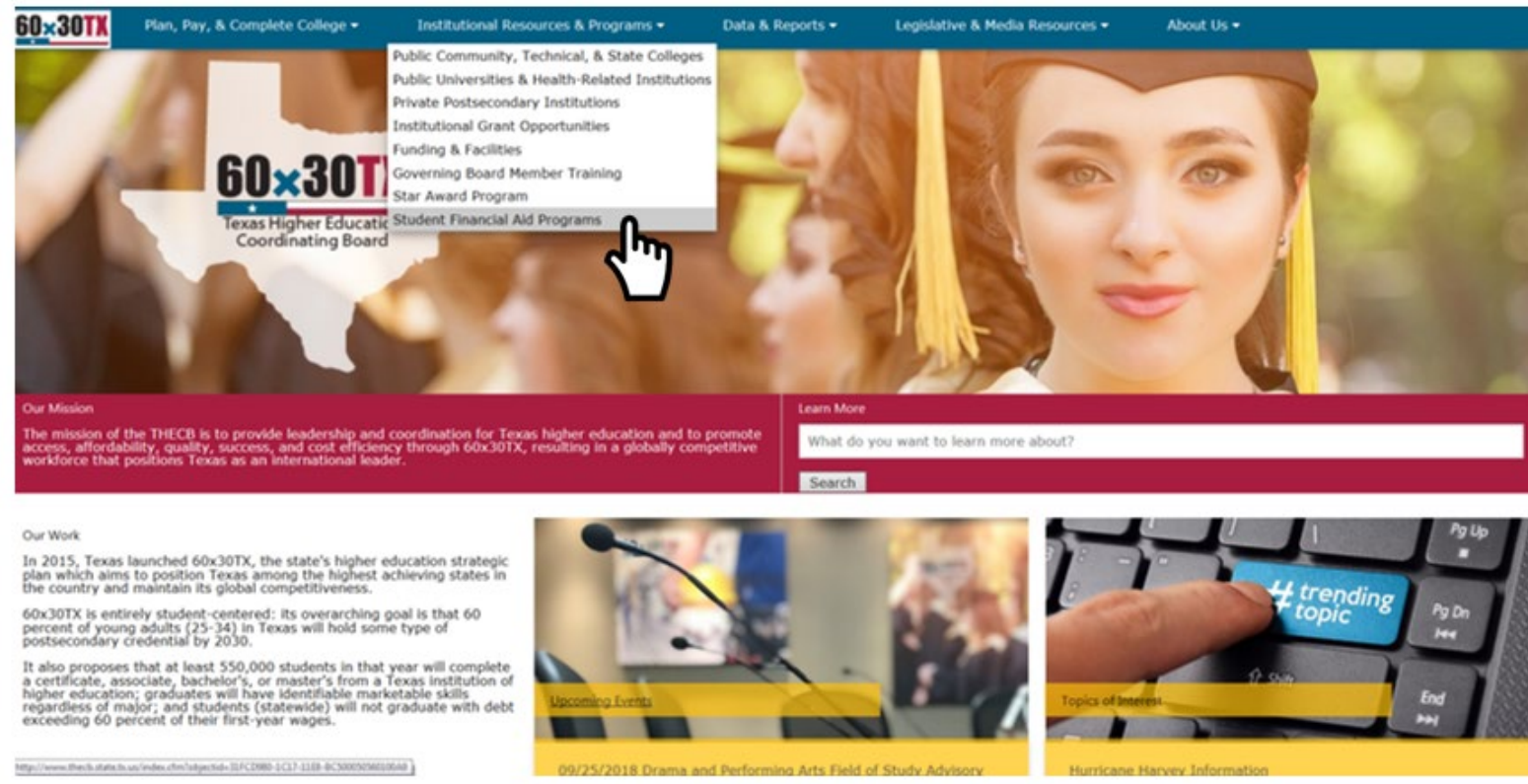
Announcements

- [College Access Loan Interest Rate Reduction](#)
- [Important COVID-19 Information](#)
- [Credit/Debit Card Payments](#)
- [Income-Based Repayment](#)

www.HHLoans.com

Student Financial Aid Programs Webpage

Institutional Resources



HigherEd.Texas.gov

Student Financial Aid Programs (SFAP) Main Webpage

- GEER
- Stay Connected
- Program Resources
- SFAP FAQs

Student Financial Aid Programs

The Office of Student Financial Aid Programs (SFAP) supports institutions of higher education with the administration of state financial aid programs. We are committed to expanding financial aid knowledge through excellence in customer service, communication, and training for Texas students, borrowers, and institutions of higher education.

System Maintenance: The Texas Higher Education Coordinating Board will be performing updates to the online [HelmNet portal](#) between **4 AM - 9 AM on Saturday, Sept. 11, 2021**. During this time, student borrowers, cosigners and institutional users may be unable to access online account information. We appreciate your understanding while these updates are being completed.

[GEER State Grant and Emergency Educational Grant](#)

Find answers to frequently asked questions, reporting requirements and other important information associated with the Governor's Emergency Education Relief (GEER) for State Grants and Emergency Educational Grant.

[Stay Connected](#)

Access the Institutional Calendar of Program Deadlines, subscribe to the SFAP listserv, follow the Financial Aid Advisory Committee, view an archive of Financial Aid Services monthly webcast, and download SFAP published memos.

[Program Resources](#)

Find information to assist with the administration of state grants, loans, work-study, scholarships, exemptions and waivers, tuition set asides, Selective Service Statement of Registration Status, and download the Texas Application for State Financial Aid (TASFA).

[SFAP Frequently Asked Questions](#)

Find answers to common questions associated with the administration of state grants, loans, work-study, exemptions and waivers.

Contact Information

Please send online inquiries through [CONTACT US](#) (select "Financial Aid Question" as the Contact Reason) and someone will respond as soon as possible.

Net Price Calculator (NPC)

- [State Net Price Calculator \(NPC\) Instructions](#)

Coronavirus

The THECB has created a dedicated webpage for [coronavirus information](#) relevant to higher education stakeholders.

Visit the [Coronavirus Frequently Asked Questions \(FAQs\)](#) webpage to get guidance on: Tuition, Refunds, and Financial Aid.

CUSTOMER SATISFACTION SURVEY: Take a moment to provide feedback.

NOTE: Check for alerts, maintenance notices and holiday closures!

Stay Connected

Resources:

- Recent and Archived Communications (Memos)
- Webcast Archives
- SFAP Listserv Form
- Calendar of Program Deadlines
- Financial Aid Advisory Committee Webpage

Stay Connected

Recent Communications

- [08/31/2021 State Financial Aid Reminders and Resource Updates Memo \[PDF\]](#)
- [08/05/2021 Impacts of Federal Student Aid Changes on State Financial Aid Requirements Memo \[PDF\]](#)
- [08/03/2021 Deadline Reminder: Program Participation Agreements \(PPA\) FY 2022 and FY 2023 Memo \[PDF\]](#)
- [07/27/2021 State Financial Aid Processing Schedule Update Memo \[PDF\]](#)
- [07/16/2021 Tuition Equalization Grant \(TEG\) FY 2022 and FY 2023 Initial Allocations Memo \[PDF\]](#)
- [07/13/2021 Transitioning Memorandum of Understanding Contracts to Program Participation Agreements Memo \[PDF\]](#)
- [07/13/2021 State Financial Aid Program FY 2022 Resource Updates Memo \[PDF\]](#)
- [07/07/2021 Toward EXcellence, Access, and Success \(TEXAS\) Grant FY 2022 Final Allocations Memo \[PDF\]](#)
- [07/07/2021 Texas Educational Opportunity Grant \(TEOG\) FY 2022 and FY 2023 Final Allocations Memo \[PDF\]](#)
- [07/07/2021 Bilingual Education Program FY 2022 Final Allocations Memo \[PDF\]](#)

WEBCAST ARCHIVES

Did you miss a webcast? Don't worry you can still watch the recorded version by visiting [Webcast Archives](#).

STUDENT FINANCIAL AID PROGRAMS LISTSERV

Subscribe to receive memos, notifications, reminders and announcements through the [GovDelivery listserv system](#).

CALENDAR OF PROGRAM DEADLINES

Download the Institutional calendar of events and deadlines to know what is coming up throughout the year.

- [Institutional Financial Aid Calendar Fall 2021 \[PDF\]](#)
- [Institutional Financial Aid Calendar Summer 2021 \[PDF\]](#)
- [Institutional Financial Aid Calendar Spring 2021 \[PDF\]](#)

FINANCIAL AID ADVISORY COMMITTEE

Follow the Financial Aid Advisory Committee and provide the THECB with advice and recommendations regarding the development, implementation, and evaluation of state financial aid programs for college students.

ARCHIVE MEMOS

[Memos 2021 Expand](#)

[Memos 2020 Expand](#)

[Memos 2019 Expand](#)

State Financial Aid Informational Webcast

ALERT!! Join the upcoming webcast using a new platform on Microsoft Teams

Tuesday, Sep. 14, at 1:30 p.m.

Launch the [Teams Link](#) to Join the Webcast.

September Topics

- Accessing Systems
- Requesting and Returning Funds
- Reviewing Online Resources
 - Websites Overview
 - Program Guidelines
 - Forms
- How to Contact Us
- Reminders and Training

Coronavirus

The THECB has created a dedicated webpage for **coronavirus information** relevant to higher education stakeholders.

Visit the **Coronavirus Frequently Asked Questions (FAQs)** webpage to get guidance on: Tuition, Refunds, and Financial Aid.

Program Resources

Under Program Type:

- Program Guidelines
- Allocation Information
- Web Portals
- Various Instruction Manuals
- Applicable Forms
 - Electronic Funds Transfer
 - Return of Funds

Program Resources

Institutions can find information to assist with the administration of state financial aid programs through the following program resources:

Grant Programs

- Resources for state grant programs: Toward EXcellence, Access, and Success (TEXAS) Grant; Texas Educational Opportunity Grant (TEOG); and Tuition Equalization Grant (TEG).

Loan Programs

- Resources for low-interest loans available to Texas residents: College Access Loan (CAL) and Texas B-On-Time (BOT) Loan.

Work-Study & Scholarships

- Resources for Texas College Work-Study (TCWS) and the Work-Study Student Mentorship Program (WSMP); and information on the Bilingual Education Program, and the Texas Armed Services Scholarship Program (TASSP).

Exemptions and Waivers

- Resources for specific programs that may exempt or waive tuition and fees for certain individuals attending public institutions of higher education in Texas.

Tuition Set-Asides

- Information on Uniform Standards for Disclosing Designated Tuition Set-Aside Funds.
- Calculate Tuition Set-Aside Amounts.

Net Price Calculator (NPC)

- [State Net Price Calculator \(NPC\) Instructions](#)

Comprehensive Program Guidelines

- [2021-2022 State Financial Aid Program Guidelines \[PDF\]](#)
- [2020-2021 State Financial Aid Program Guidelines \[PDF\]](#)
- [2019-2020 State Financial Aid Program Guidelines \[PDF\]](#)

Managing Programs

- [Grants and Special Programs Online Return of Funds Form](#)
- [Online Loans Return of Funds Form](#)
- [Electronic Funds Transfer Instructions](#)

Web Portals

To add, update or remove a user's access, submit a [User Access Form \[PDF\]](#).

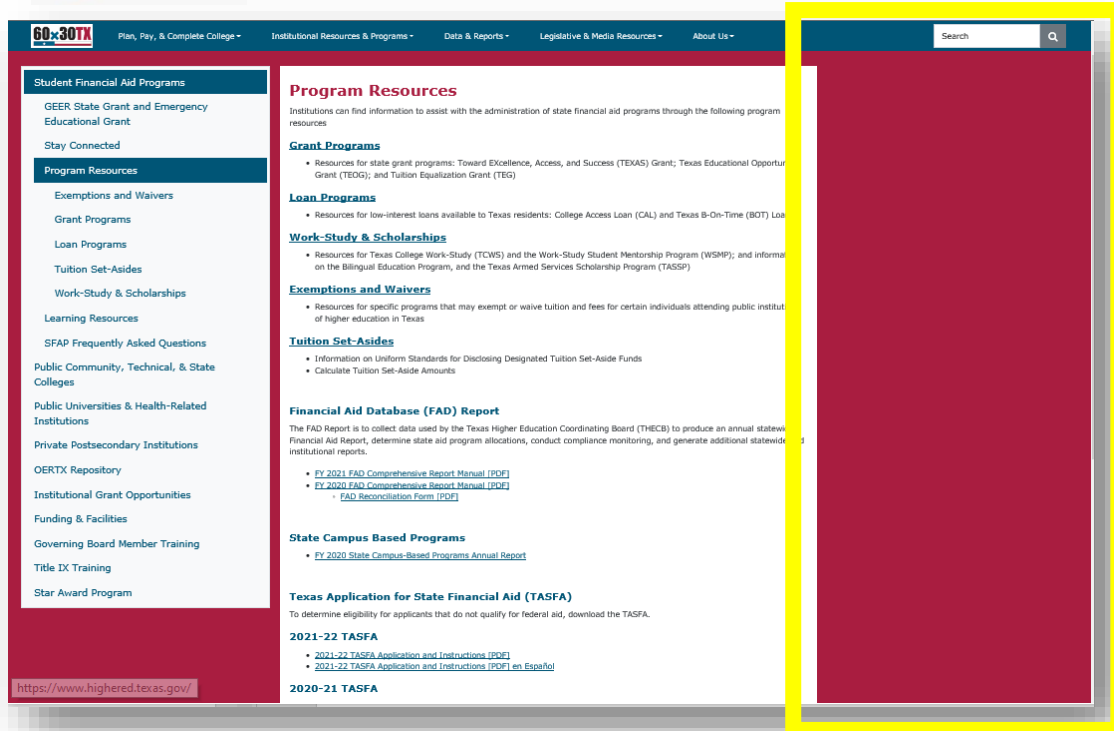
MOVEit DMZ

- [MOVEit DMZ Login](#)
- [MOVEit DMZ User Guide \[PDF\]](#)

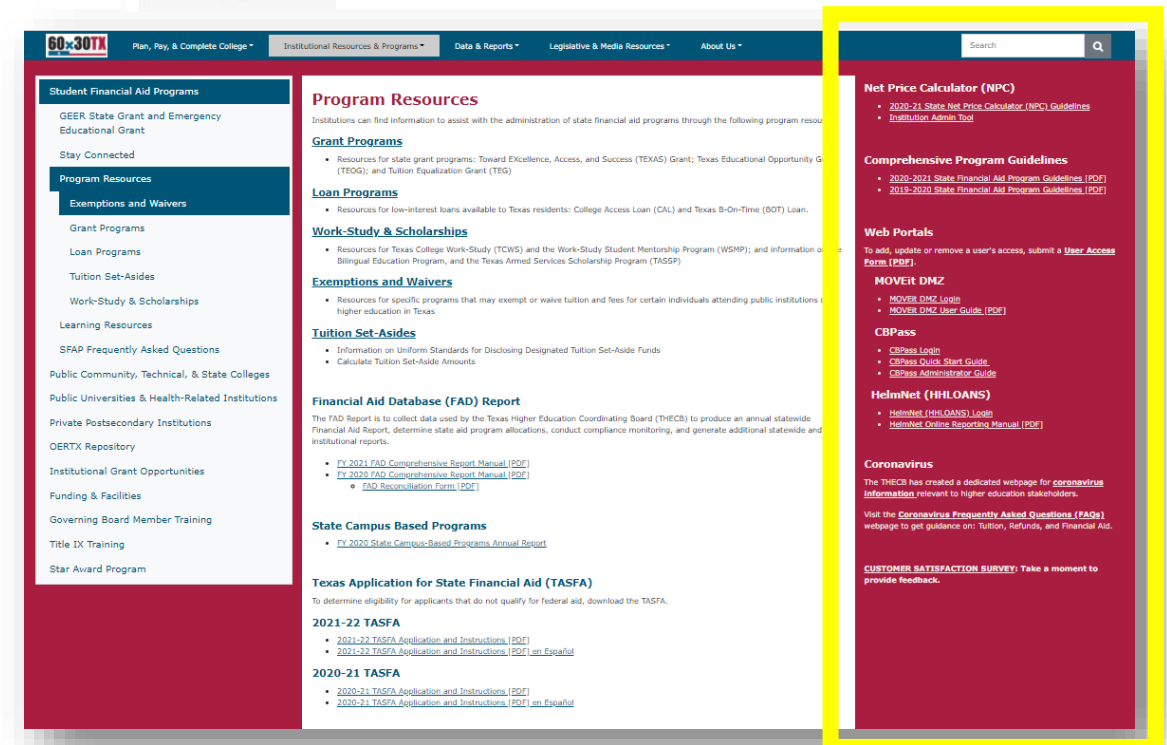
Discontinuation of Internet Explorer (IE)



Internet Explorer Browser



Chrome/Edge Browser



New Resources

New Exemption and Waiver Fact Sheets

There are two new resources on the SFAP webpage:

- Children of Professional Nursing Program Faculty and Staff - Fact Sheet
- Competitive Scholarship Waiver - Fact Sheet

NOTE: Please share with other departments who help administer E&W programs and may benefit from these resources.

Institutional Resource:

Program Resources

Institutions can find information to assist with the administration of state financial aid programs through the following program resources:

- Grant Programs**
 - Resources for state grant programs: Toward EXcellence, Access, and Success (TEXAS) Grant; Texas Educational Opportunity Grant (TEOG); and Tuition Equalization Grant (TEG).
- Loan Programs**
 - Resources for low-interest loans available to Texas residents: College Access Loan (CAL) and Texas B-On-Time (BOT) Loan.
- Work-Study & Scholarships**
 - Resources for Texas College Work-Study (TCWS) and the Work-Study Student Mentorship Program (WSMP); and information on the Bilingual Education Program, and the Texas Armed Services Scholarship Program (TASSP).
- Exemptions and Waivers**
 - Resources for specific programs that may exempt or waive tuition and fees for certain individuals attending public institutions of higher education in Texas.
- Tuition Set-Asides**
 - Information on Uniform Standards for Disclosing Designated Tuition Set-Aside Funds.
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Net Price Calculator (NPC)

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Comprehensive Program Guidelines

- 2021-2022 State Financial Aid Program Guidelines [PDF]
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Exemptions and Waivers

Texas offers various programs that exempt or waive tuition, fees, and other expenses related to attending public institutions of higher education. Programs offered can be mandatory which require participation while others are optional.

- Exemptions:** allow special groups of Texas residents or nonresidents to enroll and pay a reduced amount of tuition or fees.
- Waivers:** allow special groups of nonresidents to enroll and pay a reduced nonresident tuition rate.

All exemption or waiver programs, whether mandatory or optional, apply only to courses for which an institution can receive formula funding.

Formula Funding: is defined as the method used to allocate appropriated sources of funds among institutions of higher education. Formula-funded courses are those that do not depend solely on student tuition and fees to cover their costs.

BLIND/DEAF STUDENT EXEMPTION

- [Blind/Deaf Student Exemption Fact Sheet \[PDF\]](#)

CHILDREN OF DISABLED OR DECEASED FIREFIGHTERS AND LAW ENFORCEMENT OFFICERS

- [Children of Disabled or Deceased Firefighters and Law Enforcement Officers Guidelines \[PDF\]](#)
- [Eligibility Determination Form \[PDF\]](#)

CHILDREN OF PROFESSIONAL NURSING PROGRAM FACULTY AND STAFF

- [Children of Professional Nursing Program Faculty and Staff Fact Sheet \[PDF\]](#)

COMPETITIVE SCHOLARSHIP WAIVER

- [Competitive Scholarship Waiver Fact Sheet \[PDF\]](#)

EDUCATION BENEFITS FOR CERTAIN SURVIVORS

- [Education Benefits for Certain Survivors Guidelines \[PDF\]](#)

Children of Professional Nursing Program Faculty and Staff Fact Sheet

Highlights:

- **Purpose:** To provide an exemption from the payment of tuition to eligible students to encourage their parents to continue employment as professional nurse faculty or staff members in the State of Texas.
- All Texas public institutions offering undergraduate or graduate programs of professional nursing **are required** to participate in this program.
- The THECB publishes the program application form that the student completes but the institution collects and determines eligibility.
- The student must attend the institution the parent is employed with.

Children of Professional Nursing Program Faculty and Staff Fact Sheet

Fact Sheets highlight specific requirements in the Texas Education Code (TEC) and Texas Administrative Code (TAC) to assist institutions with the administration of programs.

Purpose
To provide an exemption from the payment of tuition to eligible students to encourage their parents to continue employment as professional nurse faculty or staff members in the State of Texas.

Eligible Parent
To qualify, the parent must meet **one** of the following criteria at the beginning of the term in which this exemption is requested:

- Hold a master's or doctoral degree in nursing AND is either employed at the beginning of the term or is contracted during all or part of the term with an undergraduate or graduate professional nursing program at your institution serving as a member of the faculty or staff
- Hold a baccalaureate degree in nursing AND is either employed at the beginning of the term or is contracted during all or part of the term by a professional nursing program at your institution as a teaching assistant

Discontinuation of Eligibility
A recipient's eligibility ends when **one** of the following criteria is met:

- Exemption received for a total of 10 semesters/terms or summer sessions
- Bachelor's degree received
- Enrolled in undergraduate hours considered to be excessive (see [TEC, Title 3, Section 54.2001\(b\)](#))

Note: A summer session that is less than nine weeks in duration is considered one-half of a summer session.

Hardship Provision:
Institutions must adopt a hardship policy that may grant a student an exception from meeting the institution's GPA requirement, or an extension of eligibility for undergraduate excess hours, when a student has a showing of a hardship or other good cause (see [TAC, Title 19, Part 1, Section 21.219](#)).

Eligible Courses
An eligible course is one in which an institution receives *formula funding* ([TEC, Title 3, Section 54.2002](#)). To determine which courses are formula funded, contact the Registrar or Data Reporting Official.

Award Amount
If the parent is employed full-time, the student can be exempted from the *total tuition* (fees not included).
If the parent is employed less than full-time, the value of the exemption **must be** prorated based on the percentage of the parent's employment load. However, if the parent's employment load is less than 25%, then the parent is considered to have an employment load of 25% for purposes of the required pro-ratio.

60x30TX

Texas Higher Education Coordinating Board

Student Eligibility

All Texas public institutions offering undergraduate or graduate programs of professional nursing are **required** to participate in this program.

Eligibility Requirements:
To qualify and continue receiving this exemption, the student must meet the following:

- Be a Texas resident
- Be 25 years of age or younger at the beginning of the term in which this exemption is requested
- Be the *biological or adopted* child of an **Eligible Parent**
- Be enrolled as an undergraduate student at the same institution the **Eligible Parent** is currently employed or contracted
- Be registered for Selective Service or be exempt
- Be an undergraduate who has **not** earned a bachelor's degree
- Meets the institution's grade point average (GPA) requirement if receiving a continuation award

Note: Student is NOT required to demonstrate financial need.

Understanding the PROCESS

1. Student enrolls in an eligible institution.
2. Student completes the program **application** and supporting documentation:
 - ✓ [Children of Professional Nursing Faculty and Staff Exemption Application](#)
 - ✓ Proof of parental employment
3. Student submits application and supporting documentation to the institution's registrar or other administrative officer.
4. Institution verifies each year that the student remains eligible based on program requirements (students must reapply each year).

Resources

- [TEC, Title 3, Section 54.355](#)
- [TEC, Title 3, Section 54.2001](#)
- [TAC, Title 19, Part 1, Chapter 21, Subchapter I](#)

Children of Professional Nursing Faculty and Staff As of 8/30/2021 1

Competitive Scholarship Fact Sheet

Highlights:

- **Purpose:** To allow a nonresident student who receives a qualifying competitive scholarship to enroll and pay the Texas resident tuition and fee rate at a participating public institution in the state of Texas.
- This is an **optional** waiver program at public institutions.
- The competitive scholarship must be at least \$1,000 (multiple scholarships cannot be combined to meet this minimum; the individual scholarship must be \$1,000 or higher)
- The institution decides how the waiver is applied to the student account.

Competitive Scholarship Waiver Fact Sheet

Fact Sheets highlight specific requirements in the Texas Education Code (TEC) and Texas Administrative Code (TAC) to assist institutions with the administration of programs.

60x30TX
Texas Higher Education Coordinating Board

Purpose

To allow a nonresident student who receives a qualifying competitive scholarship to enroll and pay the Texas resident tuition and fee rate at a participating public institution in the state of Texas.

Eligible Student

A nonresident student who:

- Receives a competitive scholarship from a Texas public institution of higher education for the academic year or term of enrollment
- Confirms Selective Service registration or exemption from the requirement

Competitive Scholarship Requirements

To qualify, a scholarship **must** meet the following requirements:

- Be at least \$1,000 (multiple scholarships cannot be combined to meet this minimum; the individual scholarship must be \$1,000 or higher)
- Be awarded by an authorized scholarship committee
- Be any scholarship, including athletic, with publicly available criteria published in advance of application requirements and deadlines
- Institution must control the selection and funding process
- Permit awards to both resident and nonresident students

Eligible Courses

Any course for which an institution receives formula funding is eligible ([TEC, Title 3, Section 54.2002](#)), even if the course is not included in the student's program of study. To determine which courses are formula funded, contact the Registrar or Data Reporting Official.

Eligible Institution

This waiver program is limited to Texas public institutions that choose to participate.

Award Amount

An eligible student will pay the Texas resident tuition and fee rate during the semester or term covered by the competitive scholarship, not to exceed a 12-month period.

There is no automatic renewal or continuation of the waiver. The student can receive the waiver in future semesters if another competitive scholarship is granted.

The number of these waivers **must not** exceed five percent of the total number of students registered at the institution for the same semester of the preceding academic year.

Understanding the FACTS

- Public institutions are *not* required to participate.
- Students are not required to demonstrate financial need to qualify for this waiver program.
- Students can receive the waiver while attempting any program of study offered at an eligible institution (i.e., undergraduate, graduate, or doctoral degree).
- Students can keep their waiver even if they lose the competitive scholarship for the applicable semester but cannot receive it starting the following semester.
- Students do not need to meet the institution's grade point average (GPA) to receive this waiver.
- Students are not impacted by the excess hours' limitation found under [TEC, Title 3, Section 54.2001\(b\)](#).

Scholarship Committee

An authorized scholarship committee must be officially recognized in writing by the institution's administration to grant scholarships. The scholarship cannot be awarded by an external organization that controls the selection and funding process, such as a fraternity or a booster club.

Understanding the PROCESS

Application Process

1. Student applies for the competitive scholarship through the institution.
2. Designated committee chooses the recipients.
3. Student is awarded the competitive scholarship.
4. Institution determines how the waiver is applied to the student's account.

Resources

[TEC, Title 3, Section 54.213](#)
[TAC, Title 19, Chapter 21, Subchapter 55, Section 21.2263](#)
[TEC, Title 3, Section 54.2001\(a\)](#)
[TEC, Title 3, Section 51.9095](#)

INSTITUTIONAL RESOURCE

As of 08/30/2021 1

How to Contact Us

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**

NOTE: Requests that require research can take up to 5 business days.

Texas Higher Education Coordinating Board

Contact Us

*An asterisk * by the field indicates a required field!*

Received From*

Institution

Contact Reason*

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*

First Name*

Last Name*

E-mail*

Phone (10-digit) Phone Ext

Mail Address

Mail Address2

Mail Address3

City

State

Zip Code (5-digit)

| [Help](#)

Reminders and Training

Reminders

Funds Request FY 2022

- Institutions can submit a Funds Request Form.

2022-23 TASFA – Oct. 1, 2021

- English and Spanish TASFA for the academic year 2022-23 will be published on Oct. 1, 2021.
- A revision was made to the IRS line references on Income Tax paid on Questions #62 and #68.

FAD Cycle Three – Oct. 6, 2021

- Files must be certified, and reconciliation is *required*.

Training

- New Aid Officer Basic Workshop: Oct. 6
- TASFAA Annual Conference: October 6-8
- Next Monthly Webcast – Oct. 19

Deadlines

FY 2022 TASSP Nominations – Sept. 30, 2021

- Deadline for Legislators to submit FY 2022 TASSP nominations.

Questions?