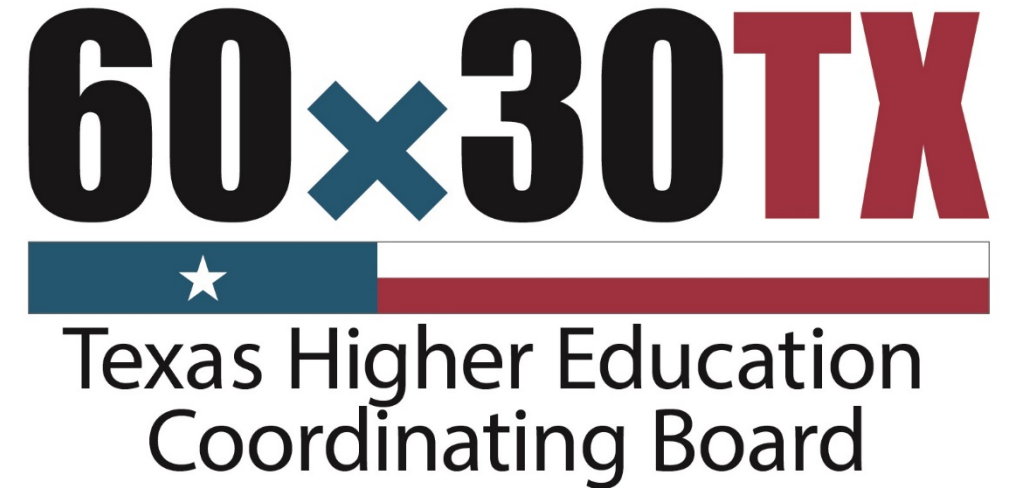


State Financial Aid Webcast

Student Financial Aid Programs
June 15, 2021



TOPICS OF DISCUSSION



Texas Application for State Financial Aid (TASFA) Updates

Preliminary Allocations 10-Day Data Review

Processing State Financial Aid Programs

Reminders, Training and Deadlines

TASFA Updates

TASFA Annual Update Process



2022-23 Paper TASFA Updates

- No substantial changes
- Annual updates to years and dates
- Selective Service Updates:
 - Adding option for females to select "N/A"
 - Updating banner color for visibility

NOTE: The Texas Legislature did not make any changes to Texas Education Code, Section 51.9095, and thus the Selective Service requirement for state financial aid remains in effect.

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 <input type="checkbox"/> 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?		14. High School Name (if applicable)
High school diploma <input type="checkbox"/> General Educational Development (GED) certificate <input type="checkbox"/> Homeschooled (Skip to Question 36) <input type="checkbox"/> None of these (Skip to Question 36) <input type="checkbox"/>		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? <input type="checkbox"/> Yes <input type="checkbox"/> 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) <input type="checkbox"/>		1st bachelor's degree <input type="checkbox"/>
1st year undergraduate <input type="checkbox"/>		2nd bachelor's degree <input type="checkbox"/>
2nd year undergraduate/sophomore <input type="checkbox"/>		Associate degree (occupational, technical, general education, or transfer program) <input type="checkbox"/>
3rd year undergraduate/junior <input type="checkbox"/>		Certificate or diploma <input type="checkbox"/>
4th year undergraduate/senior <input type="checkbox"/>		Teaching credential (nondegree program) <input type="checkbox"/>
5th year/other undergraduate <input type="checkbox"/>		Graduate or professional degree <input type="checkbox"/>
1st year graduate/professional <input type="checkbox"/>		Other/undecided <input type="checkbox"/>
Continuing graduate/professional or beyond <input type="checkbox"/>		

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

2022-23 Paper TASFA Updates Contd.

- No substantial changes
- Annual updates to years and dates
- Selective Service Updates:
 - Adding option for females to select "N/A"
 - Updating banner color for visibility

NOTE: The Texas Legislature did not make any changes to Texas Education Code, Section 51.9095, and thus the Selective Service requirement for state financial aid remains in effect.

STUDENT INFORMATION continued... (See Notes for questions 24-29) Reminder: Fill in all questions or choose N/A.

21. Where do you plan to live during the 2021-22 school year?
☐ On-campus ☐ Off-campus ☐ With parent or relative

22. At the start of the 2021-22 school year, how many credits/hours will you be enrolled in?
☐ Full-time (12 hours or more) ☐ Three-quarter time (9-11 hours)
☐ Half-time (6-8 hours) ☐ Less than half-time (5 hours or less)
☐ Not sure

23. If you are transferring schools, have you earned an Associate Degree?
☐ Yes
☐ No
(Enter date you earned Associate Degree: __/__/__)

24. Have you been convicted of a felony or a crime involving a controlled substance?
☐ Yes ☐ No

25. Have you previously received state Financial Aid?
☐ Yes ☐ No

26. (A) Do you have authorization to work in the United States?
☐ Yes ☐ No ☐ Don't know ☐ N/A
(B) If yes, are you interested in applying for a work-study program?
☐ Yes ☐ No ☐ Don't know

27. What is your current marital status?
☐ I am single ☐ I am separated
☐ I am married/remarried ☐ I am divorced or widowed

28. Month and year you were married, remarried, separated, divorced, or widowed. Month: ____ Year: ____ ☐ N/A

Were you born male or female?
☐ Male (Must complete the following Selective Service section)
☐ Female

SELECTIVE SERVICE STATEMENT OF REGISTRATION STATUS
Male students must verify their current Selective Service registration status by marking one of the statements below and providing proof of their registration status to their current institution. Failure to do so may result in the loss of eligibility for state financial aid.
For more information about the Selective Service System, visit sss.gov.

☐ I am under the age of 18 and not currently required to register.

☐ I am **REGISTERED** with the Selective Service and,
Check the following box that applies:
☐ I have already submitted proof of registration to my current institution.
☐ Proof of registration is included with this application.
☐ I will submit proof of my registration.
NOTE: Proof is required to be considered eligible for financial aid.

☐ I am **EXEMPT** from registration and,
Check the following box that applies:
☐ I have already submitted proof of my exemption to my current institution.
☐ Proof of my exemption is included with this application.
☐ I will submit proof of my exemption.
NOTE: Proof is required to be considered eligible for financial aid.

☐ I am over the age of 18. I am not registered with Selective Service and I am not exempt from registration with Selective Service.
NOTE: Choosing this option may result in the loss of eligibility for state financial aid.

Online TASFA Background

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

- TASFA to be electronic and linked through the ApplyTexas system
- Advisory committee of stakeholders to make recommendations on functionality, cost and other considerations



ALERT: HB 3273 by Neave and **SB 1860** by Powell *extended* the implementation of the electronic TASFA from 2022-23 to 2023-24 academic year to align with the recently adopted federal FAFSA simplification changes.

Online TASFA Development Goals

The overall intent of establishing the online TASFA is to:

- Provide the necessary data so schools can calculate an EFC*
- Reduce application time and improve efficiency for the student by building in skip logic
- Support students through ability to send TASFA to various schools at once
- Align with FAFSA questions and format where applicable for ease of use



*THECB will not act as a Central Processing System = no EFC, SAR, or ISIR produced

Online TASFA Stakeholders in Development

- Institutions of Higher Education
- School Districts (Counselor Suite)
- ApplyTexas - Contractor (UT Austin)
- Texas Education Agency (TEA)
- Community-Based Organizations
- Vendors of Financial Aid Management Software Systems



Online TASFA Progress

- Development and programming is underway
- Online TASFA is being incorporated into ApplyTexas Counselor Suite
- Progress has been made on how files will be sent to institutions
- First launch will be a pilot in English (Spanish will be in a future release)
- An ongoing workgroup is guiding content, technical development, and testing



Questions for Removal

- Date of Graduation (HS or GED)
- College grade level
- Conviction of drug offense
 - The state requirement will still apply
- How many credits/hours enrolled
- Associate degree for transfer students
- Previously received state aid
- Work authorization and work-study

NOTE: FAFSA simplification will also determine additional changes.

13. What will your high school (HS) completion status be when you begin college in the 2021-22 school year?		High school diploma <input type="checkbox"/>	Homeschooled (Skip to Question 16) <input type="checkbox"/>
		General Educational Development (GED) certificate (Skip to Question 16) <input type="checkbox"/>	None of these (Skip to Question 16) <input type="checkbox"/>
14. High School Name (If applicable)			
15. High School City (If applicable)	16. HS State (If applicable)	17. Date of Graduation (If applicable) X	
18. Will you have your first bachelor's degree before you begin the 2021-22 school year? <input type="checkbox"/> Yes <input type="checkbox"/> No			
19. When will your college grade level be when you begin the 2021-22 school year? X		20. What degree or certificate will you be working on when you begin the 2021-22 school year? X	
Never attended college (No college credits) <input type="checkbox"/>		1st bachelor's degree <input type="checkbox"/>	
1st year undergraduate <input type="checkbox"/>		2nd bachelor's degree <input type="checkbox"/>	
2nd year undergraduate/sophomore <input type="checkbox"/>		Associate degree (occupational, technical, general education, or transfer program) <input type="checkbox"/>	
3rd year undergraduate/junior <input type="checkbox"/>		Certificate or diploma <input type="checkbox"/>	
4th year undergraduate/senior <input type="checkbox"/>		Teaching credential (nondegree program) <input type="checkbox"/>	
5th year/other undergraduate <input type="checkbox"/>		Graduate or professional degree <input type="checkbox"/>	
1st year graduate/professional <input type="checkbox"/>		Other/undecided <input type="checkbox"/>	
Continuing graduate/professional or beyond <input type="checkbox"/>			

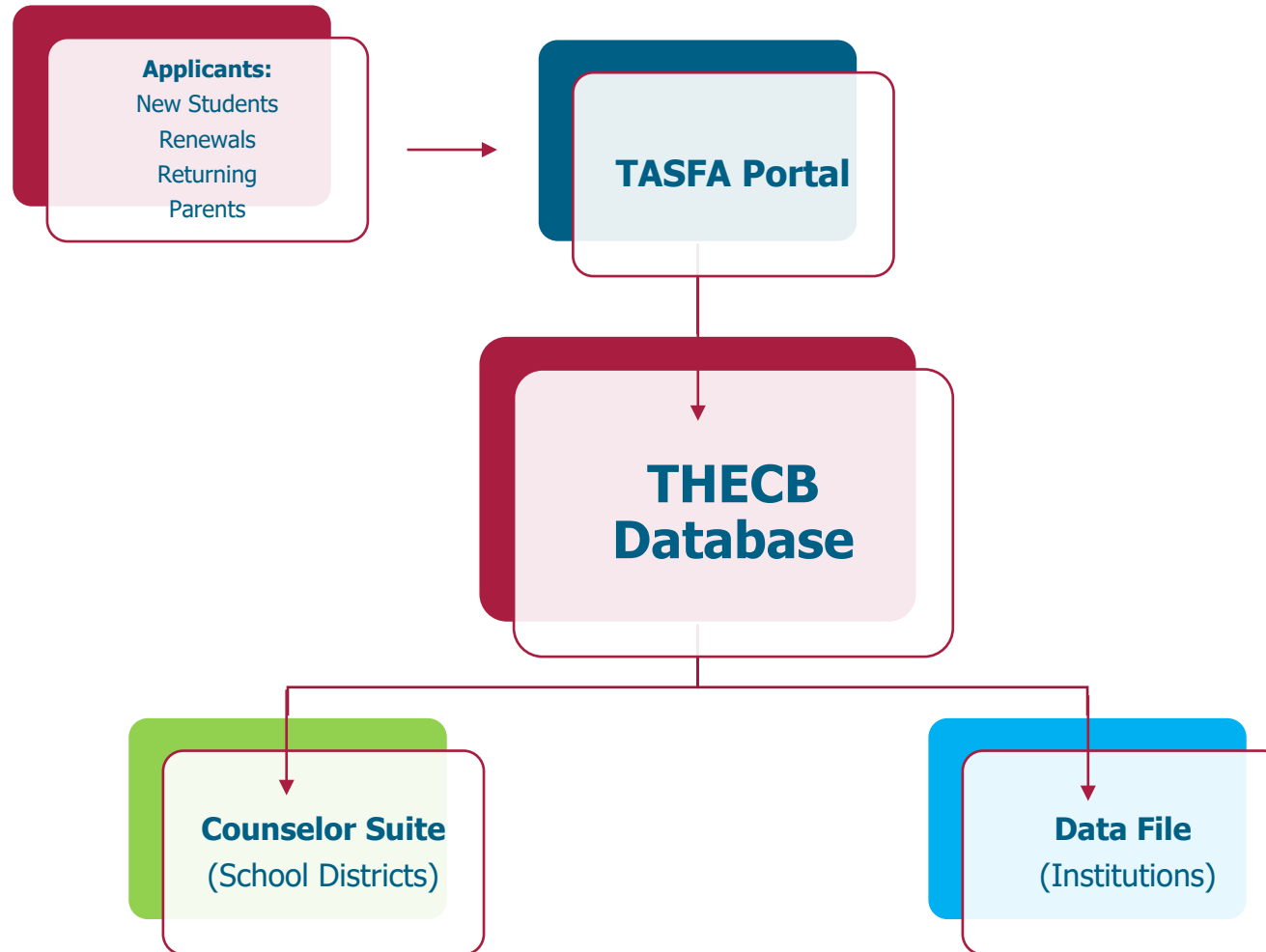
2021-22 Texas Application for State Financial Aid (TASFA)

Page 1

STUDENT INFORMATION continued... (See Notes for questions 24-29) **Reminder:** Fill in all questions or choose N/A.

21. Where do you plan to live during the 2021-22 school year? <input type="checkbox"/> On-campus <input type="checkbox"/> Off-campus <input type="checkbox"/> With parent or relative	25. Have you been convicted of a felony or a crime involving a controlled substance? <input type="checkbox"/> Yes <input type="checkbox"/> No
22. At the start of the 2021-22 school year, how many credits/hours will you be enrolled in? <input type="checkbox"/> Full-time (12 hours or more) <input type="checkbox"/> Three-quarter time (9-11 hours) <input type="checkbox"/> Half-time (6-8 hours) <input type="checkbox"/> Less than half-time (5 hours or less) <input type="checkbox"/> Not sure	26. Have you previously received state Financial Aid? <input type="checkbox"/> Yes <input type="checkbox"/> No
23. If you are transferring schools, have you earned an Associate Degree? <input type="checkbox"/> Yes (Enter date you earned Associate Degree: __/__/__) <input type="checkbox"/> No	27. (A) Do you have authorization to work in the United States? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know <input type="checkbox"/> N/A (B) If yes, are you interested in applying for a work-study program? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know
24. Were you born male or female? <input type="checkbox"/> Male (Must complete the following Selective Service section) <input type="checkbox"/> Female	28. What is your current marital status? <input type="checkbox"/> I am single <input type="checkbox"/> I am separated <input type="checkbox"/> I am married/remarried <input type="checkbox"/> I am divorced or widowed
	29. Month and year you were married, remarried, separated, divorced, or widowed. Month: _____ Year: _____ <input type="checkbox"/> N/A

DRAFT: Online TASFA Data Processing Flow

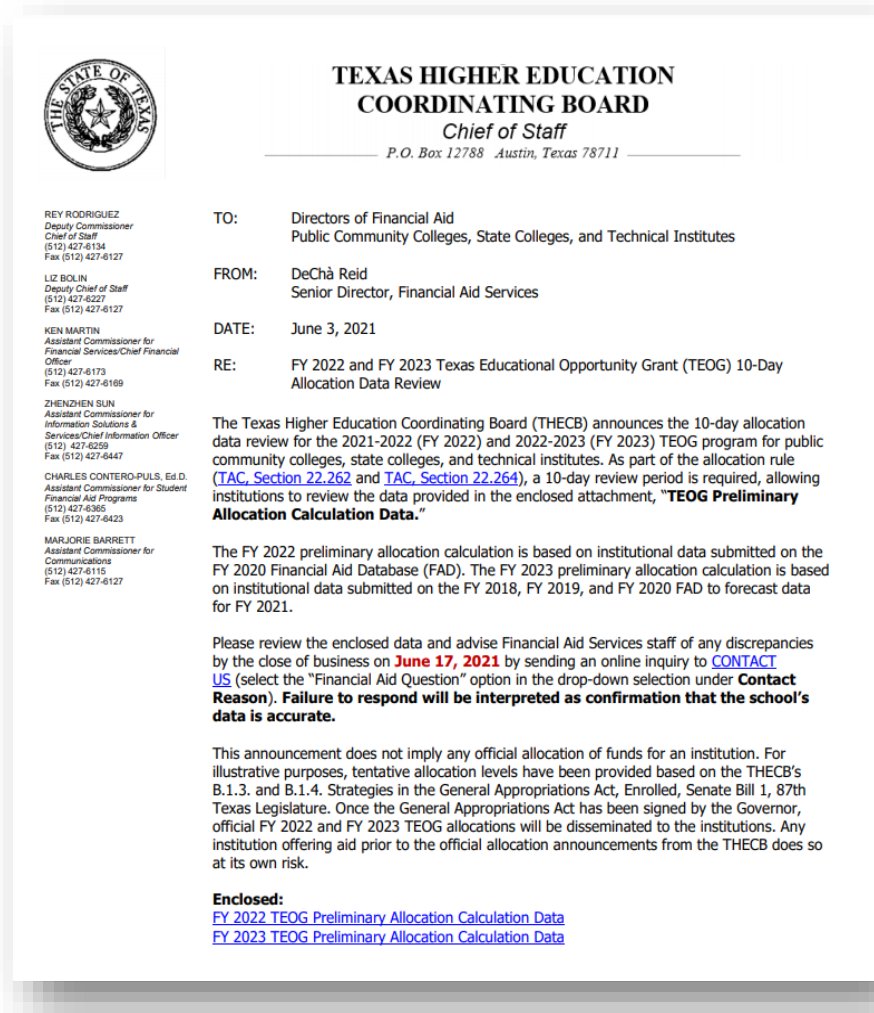


Preliminary Allocations 10-Day Data Review

FY 2022 Preliminary Allocations: 10-Day Data Review

- Memos were sent June 3, 2021, for the following programs:
 - TEXAS Grant, TEOG, EAE, TCWS, and WSMP
- Complete a new opt in/out form if a change in participation is being made.
- Deadline to review and submit discrepancies is **June 17, 2021.**
 - If discrepancies are identified, send an online inquiry to [CONTACT US](#) (select the "Financial Aid Question" option).

NOTE: TEG 10-day data review will be released at a later date.



FY 2022 Preliminary Allocations: 10-Day Data Review Contd.

- Memos were sent June 3, 2021, for the following programs:
 - TEXAS Grant, TEOG, EAE, TCWS, and WSMP
- Complete a new opt in/out form if a change in participation is being made.
- Deadline to review and submit discrepancies is **June 17, 2021.**
 - If discrepancies are identified, send an online inquiry to [CONTACT US](#) (select the "Financial Aid Question" option).

NOTE: TEG 10-day data review will be released at a later date.

60x30TX Texas Higher Education Coordinating Board

2021-22 (FY 2022) Texas State Financial Aid Opt-In / Opt-Out Form
10-Day Data Review Process

All institutions were previously required to complete a 2021-22 Opt-In/Opt-Out Form. During the 10-day data review process, institutions can choose to Opt-In/Opt-Out of these programs, regardless of the decision made on the previous submission. Institutions will have until **June 17, 2021** to submit a revised form.

*All fields on this form **must** be completed in order for the Opt-In/Opt-Out request to be processed.

* 1. Institution Name:

* 2. Institution FICE Code:

* 3. Institution Type:

☐ Public University
☐ Public Health-Related Institution
☐ Public State College
☐ Public Technical Institute
☐ Public Community College
☐ Private/Independent Institution

* 4. Select the appropriate response for the **Educational Aide Exemption (EAE) Program**, according to Institutional type. If the institution is not eligible to participate in this program based on the institution type, please select N/A.

	Opt-in	Opt-out	N/A
Educational Aide Exemption (EAE) Public Institutions Only Chapter 21, Subchapter II of the Texas Administrative Code	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Processing State Financial Aid Programs

Common Processing Scenarios

GRANT PROGRAMS <i>TEXAS Grant, TEOG, TEG</i> (Grant Payment Portal)	LOAN/SCHOLARSHIP <i>CAL & TASSP</i> (HelmNet)
Canceling Requests	Canceling Applications, Loans, or Scholarships
Requesting Additional Funds	Modifying Disbursement Dates and Amounts
Increasing/Decreasing Student Count	Reinstating Loans or Scholarships
Returning Funds	Returning Funds

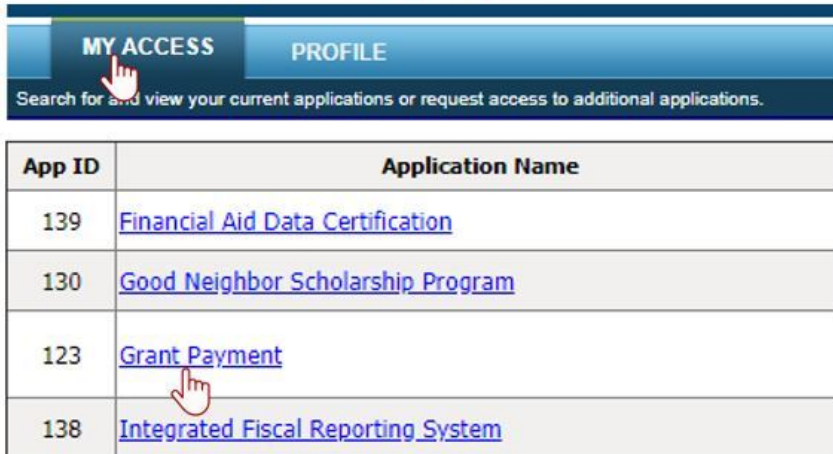
Grant Processing

Grant Processing

Requesting Funds in Grant Payment Portal (GPP) Overview

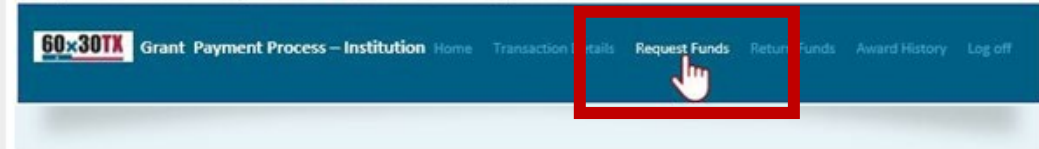
Follow these four easy steps to request funds for:
TEXAS Grant, TEOG or TEG

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



App ID	Application Name
139	Financial Aid Data Certification
130	Good Neighbor Scholarship Program
123	Grant Payment
138	Integrated Fiscal Reporting System

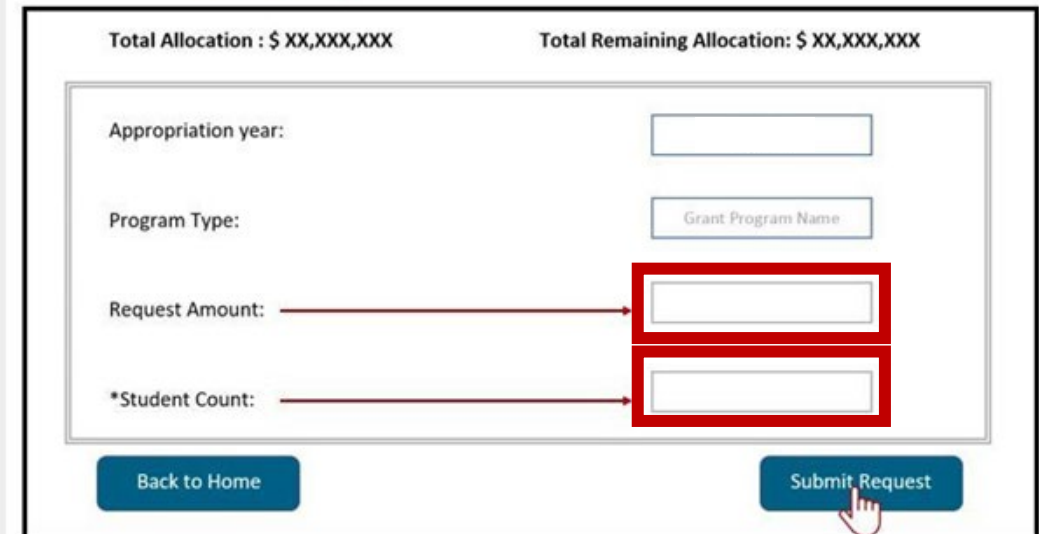
Step 2. Select **Request Funds** from navigation bar.



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:

[Back to Home](#) [Submit Request](#)

Grant Processing- Canceling Requests



Canceling Requests:

If the status in GPP is **Waiting Approval**, call FAS to cancel the transaction. If it's been **Disbursed**, a refund will need to be completed for amount that is not needed once the funds are received at the institution.

60x30TX Grant Payment Process – Institution Home **Transaction Details** Request Funds Return Funds Awards History ▼ Log Off

FICE: ##### FICE Name: THECB University Awards History- TEXAS Grant | Awards History -TEOG | Awards History -TEG Hello User 10/01/2019 8:00:00 AM

Transaction Details

Year Program Type: Status:

Run

Trans action Details

ID	Year	Status	Amount	Student Count	Date
Request-20-00###-10012019-4	2020	Request	\$150,000.00	60	10/01/2019 8:00:00 AM
Request-20-00###-09252019-3	2020	Waiting Approval	\$200,000.00	80	09/25/2019 8:00:00 AM
Request-20-00###-09202019-2	2020	Disbursed	\$1,800,000.00	720	09/20/2019 8:00:00 AM
Returned-20-00###-09152019-2	2020	CB Waiting for Funds	\$50,000.00	0	09/15/2019 8:00:00 AM
Returned-20-00###-09102019-1	2020	Returned	\$10,000.00	4	09/10/2019 8:00:00 AM
Request-20-00###-09052019-1	2020	Disbursed	\$1,000,000.00	380	09/05/2019 8:00:00 AM

Grant Processing- Canceling Requests Contd.



Canceling Requests:

If the status in GPP is **Waiting Approval**, call FAS to cancel the transaction. If it's been **Disbursed**, a refund will need to be completed for amount that is not needed once the funds are received at the institution.



Grant Processing- Canceling Requests Contd. 2



Canceling Requests:

If the status in GPP is **Waiting Approval**, call FAS to cancel the transaction. If it's been **Disbursed**, a refund will need to be completed for amount that is not needed once the funds are received at the institution.

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 Hello User
FICE Name: THECB University 10/01/2019 8:00:00 AM

Transaction Details

Year

Program Type:

Status:

Run

Trans action Details

ID	Year	Status	Amount	Student Count	Date
Request-20-00###-10012019-4	2020	Request	\$150,000.00	60	10/01/2019 8:00:00 AM
Request-20-00###-09252019-3	2020	Waiting Approval	\$200,000.00	80	09/25/2019 8:00:00 AM
Request-20-00###-09202019-2	2020	Disbursed	\$1,800,000.00	720	09/20/2019 8:00:00 AM
Returned-20-00###-09152019-2	2020	CB Waiting for Funds	\$50,000.00	0	09/15/2019 8:00:00 AM
Returned-20-00###-09102019-1	2020	Returned	\$10,000.00	4	09/10/2019 8:00:00 AM
Request-20-00###-09052019-1	2020	Disbursed	\$1,000,000.00	380	09/05/2019 8:00:00 AM

Grant Processing- Canceling and Refunds



Canceling Requests:

If the status in GPP is **Waiting Approval**, call FAS to cancel the transaction. If it's been **Disbursed**, a refund will need to be completed for amount that is not needed once the funds are received at the institution.

Reminder: Student count can be increased or decreased at any point.



Grant Processing- Additional Funds



Additional Funds ONLY:

Enter the additional amount of funds needed into GPP. If no additional students are being paid, leave the count "0".

Reminder: Instructions are located at the bottom on the page.

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: \$15,232,922.00 Total Allocation Amount Remaining: \$3,269,140.00

Appropriation Year:	<input type="text" value="2021"/>
Program Type:	<input type="text" value="TEXAS Grant"/>
* Request Amount:	<input type="text" value="\$10,000"/>
* Request Amount: Do not include special characters.	
* Student Count:	<input type="text" value="0"/>

[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 Processing- Increasing Student Count



Increasing Student Count ONLY:

Enter the additional number of students being paid into GPP. If no additional funds are being requested, leave the amount "\$0".

Reminder: Only report each student once, per academic year.

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: \$15,232,922.00 Total Allocation Amount Remaining: \$3,269,140.00

Appropriation Year:	<input type="text" value="2021"/>
Program Type:	<input type="text" value="TEXAS Grant"/>
* Request Amount:	<input type="text"/>
* Request Amount: Do not include special characters.	
* Student Count:	<input type="text"/>

[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 Processing- Decreasing Student Count



Decreasing Student Count ONLY:

Decrease the count by entering the number of students being adjusted under the Return Funds tab in GPP and enter \$0 for the amount being returned.

Reminder: Instructions are located at the bottom on the page.

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:	TEXAS Grant
* Amount Returned:	\$0
* Amount Returned: Do not include special characters.	
* Student Count:	2

* Comment:

Student are ineligible and funds could not be awarded to other students.

[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.

Grant Processing- Returning Funds



Returning Funds:

Coordinate refunds between financial aid and the business office. Also ensure the amount entered into GPP matches the total the business office is refunding back to the THECB.

Reminder: Totals should only include whole numbers.

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:	<input type="text" value="2021"/>
Program Type:	<input type="text" value="TEXAS Grant"/>
* Amount Returned:	<input type="text" value="\$10,000"/>
* Amount Returned: Do not include special characters.	
* Student Count:	<input type="text" value="2"/>
Comments:	<div>Funds could not be used during the applicable academic year. Student account being adjusted to match FA system.</div>

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.

Grant Reconciliation Tips

- **Reconcile Totals Monthly:** To ensure funding and student count totals align with THECB for end-of-year reconciliation through Financial Aid Database (FAD), make sure to review your numbers monthly.
- **Avoid Duplicating Student Count:** Only submit a GPP request for each student one time per academic year.
- **Return Funds Using Whole Dollars:** Use whole numbers (no symbols or decimals) when submitting a return to ensure totals reconcile.



Loan & Scholarship Processing

Loan and Scholarship Processing



Canceling a CAL Application:

- A student can cancel their application by calling the THECB.
- An institution **must** send an online CONTACT US to the THECB to request an application cancellation.

Reminder: Make sure to select "Financial Aid Question" as the Contact Reason, **NOT** "Student Loan Question".

Texas Higher Education Coordinating Board

Contact Us

An asterisk * by the field indicates a required field!

Received From*

Institution

Contact Reason*

Description*

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](#)

Loan and Scholarship Processing- Canceling



Canceling Loans or Scholarships:

To cancel the entire loan or scholarship *prior to disbursement*, an institution should log in and complete the update in HelmNet.

If the **Cancel Loan** option is not available, send an online [CONTACT US](#) to the THECB.

Reminder: Send similar requests (up to 10 students) in one CONTACT US inquiry to expedite processing.

Loans

Loans on File

Loan ID	Loan Type	Status	Loan Period	Principal Balance	Interest Rate	CommonLine Unique ID	
CL0001	COLLEGE ACCESS LOAN	IN SCHOOL	8/27/2018 - 5/7/2019	\$8,000.00	5.300%		Update Loan #CL0001
CL0002	COLLEGE ACCESS LOAN	IN SCHOOL	8/26/2019 - 5/5/2020	\$6,500.00	5.200%		Update Loan #CL0002

Loan and Scholarship Processing- Canceling Contd.



Canceling Loans or Scholarships:

To cancel the entire loan or scholarship *prior to disbursement*, an institution should log in and complete the update in HelmNet.

If the **Cancel Loan** option is not available, send an online [CONTACT US](#) to the THECB.

Reminder: Send similar requests (up to 10 students) in one CONTACT US inquiry to expedite processing.

@1-08 - Cancel Loan for Loan #CL0003

Update Loan Period

Cancel Loan

Pre-Disbursement Changes

Post-Disbursement Changes

School Refund

School Refund Correction

Borrower SSN: ***-**-****

Loan Type: COLLEGE ACCESS LOAN

Guarantee Date: 8/10/2020

CommonLine ID:

Guarantee Amount: \$10,000.00

Loan Balance: \$0.00

Academic End Date: 12/31/2020

Loan Cancellation Date: 11/16/2020



Your transaction has been submitted for processing. Please check your status at a later time.

Reset

Save

Loan and Scholarship Processing- Disbursements



Canceling or Modifying Disbursements:

To cancel, adjust or modify an individual disbursement or change the hold/release option, an institution should log in and complete the update in HelmNet.

If any of these actions cannot be completed, send an online [CONTACT US](#) to the THECB.

Reminder: Students cannot modify a loan or scholarship once it has been certified by the institution.

@1-09 - Pre-Disbursement Changes for Loan #CL0002

Update Loan Period
Cancel Loan
Pre-Disbursement Changes
Post-Disbursement Changes
School Refund
School Refund Correction

Borrower SSN: ***-**-****
Loan Type: COLLEGE ACCESS LOAN
Guarantee Date: 7/21/2020
CommonLine ID:

Guarantee Amount: \$20,000.00
Loan Balance: \$10,000.00
Academic End Date: 5/11/2021
Cancel Amount: \$1,000.00

Disb Number:	1	2	3	4
Status:	DISBURSED	PENDING/RELEASED		
Gross Amount:	10000.00	9000.00		
Date:	08/10/2020	01/09/2021		
Hold/Release:	Release	Release		
Cancel Date:				

Reset

Calculate

Save

Loan and Scholarship Processing- Disbursements Contd.



Canceling or Modifying Disbursements:

To cancel, adjust or modify an individual disbursement or change the hold/release option, an institution should log in and complete the update in HelmNet.

If any of these actions cannot be completed, send an online [CONTACT US](#) to the THECB.

Reminder: Students cannot modify a loan or scholarship once it has been certified by the institution.

Texas Higher Education Coordinating Board

Contact Us

An asterisk * by the field indicates a required field!

Received From* INSTITUTION

Institution

Contact Reason* *Financial Aid Question

Description* 4000 characters max

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

Is this a complaint No ☒ Yes ☐

Contact Preference E-MAIL ☒ LETTER ☐ PHONE ☐

Salutation* Dr.

First Name*

Last Name*

E-mail*

Phone (10-digit) Phone Ext

Mail Address

Mail Address2

Mail Address3

City

State -- please select State -- Zip Code (5-digit)

Submit | [Help](#)

Loan and Scholarship Processing- Reinstating



Reinstating Loans or Scholarships:

While the **Reinstate Loan** option currently appears in HelmNet after a full cancellation, requests for a reinstatement must be sent through [CONTACT US](#) to be processed by the THECB. Using this link through HelmNet will not generate a reinstatement.

Reminder: Only the first three options in the menu can be used by the institution in HelmNet.

Update Loan Period

Reinstate Loan

Pre-Disbursement Changes

Post-Disbursement Changes

School Refund

School Refund Correction

Loan and Scholarship Processing- Reinstating Contd.



Reinstating Loans or Scholarships:

While the **Reinstate Loan** option currently appears in HelmNet after a full cancellation, requests for a reinstatement must be sent through [CONTACT US](#) to be processed by the THECB. Using this link through HelmNet will not generate a reinstatement.

Reminder: Only the first three options in the menu can be used by the institution in HelmNet.

CL Change Transactions for Loan #00000#

Update Loan Period

Cancel Loan

Pre-Disbursement Changes

Post-Disbursement Changes

School Refund

School Refund Correction

Borrower SSN: XXXXXXXX

Loan Type: CAL / TASSP

Guarantee Date: ## / ## / #####

CommonLine ID: XXXXXXXXXXXXXXXX

Return To Borrower Summary (XXXXXXXX)


Loan and Scholarship Processing- Returning



Returning Funds:

Coordinate refunds between financial aid and the business office. Also ensure the amount entered onto the Return of Funds form matches the total the business office is refunding back to the THECB.

Reminder: Make sure to confirm all entries so the refund can be applied to the student account appropriately.



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Texas Higher Education Coordinating Board

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: 06-15-2021	FICE Code: <input style="width: 80%;" type="text"/>	Institution: <input style="width: 95%;" type="text"/>
Contact Information		
Position	Name	Email
Financial Aid Director	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Reporting Official	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Business Office Contact	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Program <input style="width: 40%;" type="text" value="--- Select A Program Type ---"/>		<div style="display: flex; justify-content: space-between;"> Total refund: <input style="width: 15%;" type="text"/> PCA# <input style="width: 15%;" type="text"/> </div>
<div style="display: flex; justify-content: space-between;"> Disbursement Year: Calendar year the funds were disbursed Term: F = Fall S = Spring SM = Summer Award: F = Full P = Partial </div> <div style="display: flex; justify-content: space-between;"> Explanation: INST Canceled = Institution Initiated Cancellation STDNT Canceled = Student Initiated Cancellation </div>		

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
	▼		▼		▼					▼
	▼		▼		▼					▼
	▼		▼		▼					▼
	▼		▼		▼					▼
	▼		▼		▼					▼
	▼		▼		▼					▼
	▼		▼		▼					▼
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	▼		▼		▼					▼
	▼		▼		▼					▼
	▼		▼		▼					▼
	▼		▼		▼					▼

Reset
Submit

Loan and Scholarship Processing- Browsers



Checking Internet Browser:

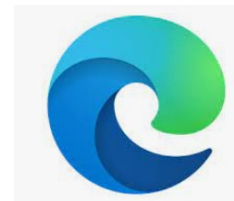
Internet Explorer will not be compatible in the near future and should be avoided when using THECB applications including HelmNet for loan and scholarship processing and reporting.



Not Compatible



Compatible



Compatible

Loan and Scholarship Tips

Access Available Resources:

Various instructions and guides associated with loans and scholarships are available on the SFAP webpage under Program Resources.

Utilize Reporting and Queries:

HelmNet has different reporting and query options to help institutions manage applications, loans and scholarships on an as-needed basis.

HelmNet Change Transactions Instruction Guide

Purpose

The purpose of this guide is to provide instructions on how to process change transactions during the current program year after completing certification for the College Access Loan (CAL) and Texas Armed Services Scholarship Program (TASSP) through the HelmNet Online portal.

Accessing Update Options

Institutions can use the Update Loan feature within the HelmNet portal to make certain updates to a certified loan or scholarship using two different options.

Option 1: Pull up the student record in HelmNet by using the Borrower Query.

- Click on the Update Loan option on the Borrower Summary screen.

Loans on File

Loan ID	Loan Type	Status	Loan Period	Principal Balance	Interest Rate	Comments/Line
00000000000000000000	COLLEGE ACCESS LOAN	IN SCHOOL	8/18/2020 - 5/11/2021	\$0.00	4.250%	00000000000000000000

System Tip
Depending on your screen resolution settings, you may need to EXPAND the data in order to access the Update Loan button.

Option 2: Institution can use the online Loan Reporting feature in HelmNet to access a listing of scholarship or loan recipients. Available reports include:

- Pending School Certification
- Certified-No Allocated Funds Available
- Certified Applications in Process
- Pending Disbursement-Need Documents
- Pending Future Disbursements
- Disbursed

Note: Refer to the [HelmNet Online Reporting Instructions](#) for more information regarding this tool.

Transaction Options

The following three transaction options are currently available:

- Update Loan Period
- Cancel Loan
- Pre-Disbursement Changes

The following are unavailable:

- Post-Disbursement Changes
- School Refund
- School Refund Correction

CL Change Transactions for Loan #000000#

Update Loan Period
Cancel Loan
Pre-Disbursement Changes
Post-Disbursement Changes
School Refund
School Refund Correction

Return to Borrower Summary ()

HelmNet Change Transactions Instruction Guide As of 11/10/2020 1

Update Loan Period

By selecting the Update Loan Period option, institutions can make the following changes during the program year:

- Change Loan Period
- Change Grade Level
- Change Anticipated Graduation Date

Update Loan Period

Update Loan Period
Cancel Loan
Pre-Disbursement Changes
Post-Disbursement Changes
School Refund
School Refund Correction

Update Loan Period
Cancel Loan
Pre-Disbursement Changes
Post-Disbursement Changes
School Refund
School Refund Correction

Cancel Loan

By selecting the Cancel Loan option, institutions can enter a date of cancellation prior to disbursement.

- Once cancelled, the Reinstatement Loan option appears but reinstatement requests must be sent through [CONTACT US](#) to be processed by the THECB.

Pre-Disbursement Changes

By selecting the Pre-Disbursement Changes option, institutions can make the following changes on pending disbursements:

- Cancel Disbursement
 - Enter \$0.00 in Gross Amount and enter a Cancel Date
- Change Disbursement Date
- Change Disbursement Amounts
 - Increase/Decrease pending disbursements
- Change Disbursement Status
 - Hold or Release

System Tip
Using the Hold feature will prevent funds from disbursing to the institution. Institutions will need to manually Release the disbursements on Hold.

Update Loan Period

Update Loan Period
Cancel Loan
Pre-Disbursement Changes
Post-Disbursement Changes
School Refund
School Refund Correction

Disb Number:

Disb Number	Disb Amount	Disb Date	Disb Status	Disb Amount	Disb Date	Disb Status
1	1,000.00	08/18/2020	Disbursed	2	1,000.00	Disbursed
3	1,000.00	08/18/2020	Disbursed	4	1,000.00	Disbursed

Note: To increase an amount, the total of all disbursements cannot exceed the Guarantee Amount.

HelmNet Change Transactions Instruction Guide As of 11/10/2020 2

Loan and Scholarship Tips- Chart

Access Available Resources:

Various instructions and guides associated with loans and scholarships are available on the SFAP webpage under Program Resources.

Utilize Reporting and Queries:

HelmNet has different reporting and query options to help institutions manage applications, loans and scholarships on an as-needed basis.

HelmNet Loans and Scholarships Updates Chart

Changes can be made at various stages of the loan or scholarship life-cycle. The chart below identifies the appropriate action based on the stage.

Program	HelmNet Change Transactions	LIFE CYCLE					Additional Information
		Application	School Certification Complete LAD Sent	LAD Accepted Loan Pending Future Disbursement	Partial Disbursement	Full Disbursement	
CAL TASSP	Cancel a loan		✓	✓			A loan or scholarship can be fully canceled up until the first payment is Ready to be Disbursed (3 business days before the disbursement date).
CAL TASSP	Cancel a disbursement		✓	✓	✓		
CAL TASSP	Change disbursement date		✓	✓	✓		Pending disbursements can be changed up until they are Ready to be Disbursed (3 business days before the disbursement date).
CAL TASSP	Change disbursement amount (increase/decrease)		✓	✓	✓		
CAL TASSP	Change disbursement status to Hold or Release		✓	✓	✓		
CAL TASSP	Change loan period date		✓	✓	✓	✓	Changes to the Loan Period Dates, Graduation Date and Grade level can be made during the current program year after an institution certifies an application.
CAL TASSP	Change student's Anticipated Graduation Date		✓	✓	✓	✓	
CAL TASSP	Change student's grade level		✓	✓	✓	✓	

*LAD = Private Education Loan Approval Disclosure

HelmNet Change Transactions Instruction Guide As of 11/10/2020 3

Loan and Scholarship Tips- SFAP Website

Access Available Resources:

Various instructions and guides associated with loans and scholarships are available on the SFAP webpage under Program Resources.

Utilize Reporting and Queries:

HelmNet has different reporting and query options to help institutions manage applications, loans and scholarships on an as-needed basis.

The screenshot displays the SFAP website interface. The top navigation bar includes links for 'Plan, Pay, & Complete College', 'Institutional Resources & Programs', 'Data & Reports', 'Legislative & Media Resources', and 'About Us', along with a search bar. A left sidebar lists categories such as 'Public Community, Technical, & State Colleges', 'Public Universities & Health-Related Institutions', 'Private Postsecondary Institutions', 'OERTX Repository', 'Institutional Grant Opportunities', 'Funding & Facilities', 'Governing Board Member Training', 'Title IX Training', 'Star Award Program', 'Student Financial Aid Programs' (highlighted), and 'GEER State Grant and Emergency Educational'. The main content area features a 'Loan Programs' section with a 'COLLEGE ACCESS LOAN (CAL) PROGRAM' description and links to 'FY 2022 CAL Guidelines [PDF]', 'FY 2021 CAL Guidelines [PDF]', and 'FY 2020 CAL Guidelines [PDF]'. Below this is the 'B-ON-TIME (BOT) LOAN' section, noting its discontinuation as of August 31, 2020, and providing links to 'FY 2021 BOT School Official Authorization Form [PDF]', 'FY 2020 BOT Allocations [PDF]', 'FY 2020 BOT Reallocation Request Form [PDF]', and 'FY 2020 BOT Guidelines [PDF]'. A right sidebar, highlighted with a yellow border, contains 'Manage Loan Programs' with links to 'Online Loans Return of Funds Forms', 'HelmNet Online Reporting Instructions', 'HelmNet Change Transactions Instruction Guide**NEW**', 'B-On-Time loan FAQ', 'IRS Certification Requirements', and 'Electronic Funds Transfer Instructions'. Below this is the 'Web Portals' section with a 'User Access Form [PDF]' link, and the 'MOVEit DMZ' section with links to 'MOVEit DMZ Login' and 'MOVEit DMZ User Guide [PDF]'. The bottom of the right sidebar features 'HelmNet (HHLOANS)' with links to 'HelmNet (HHLOANS) Login' and 'HelmNet Online Reporting Manual [PDF]'.

60x30TX Plan, Pay, & Complete College Institutional Resources & Programs Data & Reports Legislative & Media Resources About Us Search

Public Community, Technical, & State Colleges

Public Universities & Health-Related Institutions

Private Postsecondary Institutions

OERTX Repository

Institutional Grant Opportunities

Funding & Facilities

Governing Board Member Training

Title IX Training

Star Award Program

Student Financial Aid Programs

GEER State Grant and Emergency Educational

Loan Programs

COLLEGE ACCESS LOAN (CAL) PROGRAM

CAL program funds are available to eligible students attending public or private nonprofit institutions and entities, including Regional Education Services Centers located in Texas are eligible to participate in the CAL program. This program is authorized by [TEC, Chapter 52, Subchapter A](#). Rules establishing procedures to administer the subchapter can be found in [Title 19 of the TAC, Chapter 22, Subchapter C](#).

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

B-ON-TIME (BOT) LOAN

The Texas B-On-Time loan program has been discontinued as of August 31, 2020 and no more funding can be issued. This program is authorized by [TEC, Chapter 56, Section 56.0092](#). Rules establishing procedures to administer the program can be found in [Title 19 of the TAC, Chapter 22, Subchapter Q](#).

- [FY 2021 BOT School Official Authorization Form \[PDF\]](#)
- [FY 2020 BOT Allocations \[PDF\]](#)
- [FY 2020 BOT Reallocation Request Form \[PDF\]](#)
- [FY 2020 BOT Guidelines \[PDF\]](#)

Manage Loan Programs

- [Online Loans Return of Funds Forms](#)
- [HelmNet Online Reporting Instructions](#)
- [HelmNet Change Transactions Instruction Guide**NEW**](#)
- [B-On-Time loan FAQ](#)
- [IRS Certification Requirements](#)
- [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 \[PDF\]](#)

HelmNet (HHLOANS)

- [HelmNet \(HHLOANS\) Login](#)
- [HelmNet Online Reporting Manual \[PDF\]](#)

Loan and Scholarship Tips- Guides and Portals

Access Available Resources:

Various instructions and guides associated with loans and scholarships are available on the SFAP webpage under Program Resources.

Utilize Reporting and Queries:

HelmNet has different reporting and query options to help institutions manage applications, loans and scholarships on an as-needed basis.

HelmNet Online Reporting

Purpose
The **Online Reporting** feature within the HelmNet portal provides institutions a secure method to run and export real-time data for the College Access Loan (CAL), Texas Armed Services Scholarship Program (TASSP), and B-on-Time (BOT) programs. Administrators can access program summaries as well as borrower-specific details from application to final disbursement.

Reports
Financial aid administrators with HelmNet permissions can run reports on each **Program Type**—CAL, TASSP, or BOT—for the selected **Program Year**. The *program year* is the state fiscal year (Sept. 1 through Aug. 31). Report data consist of student accounts with a loan period end date that falls within the selected program year. If an administrator were to run a report for Program Year 2021, the report results would include data from all student accounts that have a loan period end date between Sept. 1, 2020 and Aug. 31, 2021 (FY 2021).
Seven report options, referred to as **Report Names**, are available:

- Summary
- Pending School Certification
- Certified—No Allocated Funds Available
- Certified Applications in Process
- Pending Disbursement—Need Documents
- Pending Future Disbursements
- Disbursed

Accessing Reports
After logging into HelmNet, select **Loan Reporting** from the left-hand navigation. Then select the **School Loan Reports** button.

Use the drop-down arrows to select the report criteria:

- **Program year:** The state fiscal year (Sept. 1 through Aug. 31)
- **Report name:** 7 report options
- **Loan type:** CAL, BOT, or TASSP

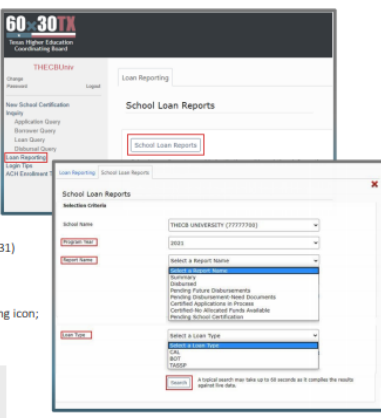
Select the **Search** button to run the report. (You may see a circling icon; a typical search may take up to 120 seconds.)

System Tips

- For best results, use one of these internet browsers: Microsoft Edge, Google Chrome, Mozilla Firefox, or Safari. The reporting feature is **not compatible** with Internet Explorer.
- Do not use the "back" arrow in your browser; you could be logged out.
- If you are unable to view the left navigation, then zoom out.
- Your session will expire after **20 minutes** of inactivity. An alert will pop up, and you will have 60 seconds to select "Extend" before the system ends your session and you must log in to HelmNet again.

Need access to HelmNet? Have your financial aid director submit the [System Authorization Form](#).

Questions? [Contact Us](#). Select "Financial Aid Question" as the Contact Reason.



HelmNet Online Reporting As of 8/03/2020 1

THECBUniv

Change
Password

Logout

New School Certification
Inquiry

Application Query

Borrower Query

Loan Query

Disbursal Query

Loan Reporting

Login Tips

ACH Enrollment Tips

Reminders, Training and Upcoming Deadlines

Reminders

2020-21 Authority to Transfer – **Deadline 7/1/2021**

- 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)

Financial Aid Database Cycle Two

- **06/23/21** (Wed) - First day to submit 2020-21 (FY 2021) FAD Cycle Two

Training

- Next Monthly Webcast – **July 13, 2021**

Upcoming Deadlines

- **6/11/2021** - Deadline to submit WSMP Financial Reports
- **6/17/2021** - Deadline to contact FAS on discrepancies for the 10-day data review of preliminary allocations

Questions

