State Financial Aid
Monthly Webcast
May 24, 2022
Topics of Discussion

- FY 2023 Program Guidelines Grant Updates
- User Access Annual Review
- Online TASFA Updates
- Deadlines and Reminders
- Questions
FY 2023 Program Guidelines

Grant Updates
Annual Updates

- Program Years
- Award Amounts
- Deadline Dates
- Priority EFC
- TEC and TAC

**Alert: Priority EFC**

The priority EFC set by the THECB should serve as a method for prioritizing initial year awards for eligible students and is not an eligibility requirement to receive an award. The calculated priority EFC for 2022-23 is $6,454.

**PROGRAM RULES AND STATUTES**

- Texas Program Statutes
- Texas Education Code TEC, Title 3, Chapter 56, Subchapter P [PDF]
- Texas Administrative Code TAC, Title 19, Chapter 22, Subchapter A [PDF]

- Texas Program Rules
- TAC, Title 19, Chapter 22, Subchapter M [PDF]

**2022-23 AWARD MAXIMUMS**

Students may be issued a total of three awards (fall, spring, and summer) in an academic year.

<table>
<thead>
<tr>
<th>INSTITUTION TYPE</th>
<th>SEMESTER MAX</th>
<th>YEAR MAX (fall, spring &amp; summer)</th>
<th>TARGET SEMESTER MAX</th>
<th>TARGET YEAR MAX (fall, spring &amp; summer)</th>
</tr>
</thead>
<tbody>
<tr>
<td>PUBLIC UNIVERSITIES, HRIs</td>
<td>$5,379</td>
<td>$16,137</td>
<td>$2,500</td>
<td>$7,500</td>
</tr>
</tbody>
</table>
Enhancement: Grant Payment Portal Instructions

- Registration Process
- Requesting Funds
- Canceling a Request
- Returning Funds
- Student Count Changes

**CBPASS GRANT PAYMENT PORTAL INSTRUCTIONS**

**REGISTRATION PROCESS**

**REQUESTING FUNDS**

**CANCELLING A REQUEST**

**RETURNING FUNDS**

**STUDENT COUNT CHANGES**

The Student Count can be increased or decreased at any point by the institution during the current award year.

- **To increase the Student Count:**
  - Enter the number of students being added (the difference) under the Request Funds tab.
  - Enter $0 for the amount of funds being requested.

  **Example:** The Student Count reported in GPP is 100 students, but the institution has actually paid 120 students grant funds for the award year. To add the additional 20 students into the GPP, enter 20 in the Student Count on the Request Funds tab and $0 for the amount of funds being requested. This will increase the total Student Count from 100 to 120.

- **To decrease the Student Count:**
  - Enter the number of students being reduced (the difference) under the Return Funds tab.
  - Enter $0 for the amount of funds being returned and a comment to clarify changes to the Student Count.

  **Example:** The Student Count reported in GPP is 100 students, but the institution has only paid 80 students grant funds for the award year. To reduce the total reported in the GPP, enter 20 in the Student Count on the
Enhancement: Added Clarity

- **Eligibility** section for TEXAS Grant to expand military pathway language based on TAC rules.

- **Hardships** section in the three grant programs to better align with TAC rules.
Memo was sent Sept. 29, 2021 to communicate:

- Institutions will no longer be required to collect “proof” of registration or exemption from students.

- Institutions are not required to verify the accuracy of the statement against external databases or other resources if there is no conflicting information.
Statement of Student Eligibility

Memo was sent Sept. 29, 2021 to communicate:

• Institutions that collect statements for the TEXAS Grant and TEOG program need to revise any language that limits this requirement to offenses only related to controlled substance offenses to also include all felony convictions.

• Institutions are only required to collect the statement and are not required to verify the accuracy of that statement against external databases or other resources if there is no conflicting information.
Child Support Arrearages

Under the Texas Family Code, Title 5, Section 231.006:

“INELIGIBILITY TO RECEIVE STATE GRANTS OR LOANS OR RECEIVE PAYMENT ON STATE CONTRACTS. (a) A child support obligor who is more than 30 days delinquent in paying child support and a business entity in which the obligor is a sole proprietor, partner, shareholder, or owner with an ownership interest of at least 25 percent is not eligible to:

(1) receive payments from state funds under a contract to provide property, materials, or services; or
(2) receive a state-funded grant or loan”

⚠️ ALERT: Child Support Arrearages

Per Texas Family Code, Title 5, Section 231.006, a student who is obligated to pay child support and is more than 30 days delinquent is not eligible to receive a state-funded grant.

Institutions determine how to best comply with this state requirement and should work with their legal counsel on questions related to this statutory mandate.
Authority to Transfer

- The THECB approved an amendment to TAC, Title 19, Section 22.11 during their quarterly meeting held on April 28, 2022.
- The allowable amounts for the Authority to Transfer Funds process have changed from 10% to 25% and from $20,000 to $60,000.
- Institutions must submit an online FY 2022 Authority to Transfer Request by July 1, 2022.
User Access Annual Review

Instructions
User Access Annual Review

**Memo** was sent May 17, 2022

For compliance and security purposes, institutions are required each year to verify the THECB's list of user accounts for the three financial aid portals:

- Higher Education Loan Management System (HelmNet)
- Coordinating Board Pass (CBPass)
- MOVEit DMZ

Portal accounts that have not been used in over 12 months will be deleted to ensure security. The Director of Financial Aid must submit a new user access form if the staff member requires access in the future.

**Deadline: June 10, 2022**
### Step 1: Review User Account Spreadsheet

To comply with the Texas Higher Education Coordinating Board (THECB) privacy and security policy, the Director of Financial Aid must complete these steps:

1. Filter and review your institution’s user accounts for the CBPass, MOVEIt, and HelmNet web portals listed below. Determine whether updates are needed. Determine whether updates are needed.
2. If updates are necessary, complete and submit a User Access Form - Annual Review.
3. All institutions must complete the required Online Verification Form.

<table>
<thead>
<tr>
<th>Web Portal</th>
<th>Institution</th>
<th>First Name</th>
<th>Last Name</th>
<th>Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>MOVEIt</td>
<td>ABC University</td>
<td>Minnie</td>
<td>Mouse</td>
<td><a href="mailto:minniemouse@abc.edu">minniemouse@abc.edu</a></td>
</tr>
<tr>
<td>MOVEIt</td>
<td>ABC University</td>
<td>Donald</td>
<td>Duck</td>
<td><a href="mailto:donaldduck@abc.edu">donaldduck@abc.edu</a></td>
</tr>
<tr>
<td>HelmNet</td>
<td>ABC University</td>
<td>Pluto</td>
<td>Dog</td>
<td><a href="mailto:pluto@abc.edu">pluto@abc.edu</a></td>
</tr>
<tr>
<td>HelmNet</td>
<td>ABC University</td>
<td>Daffy</td>
<td>Duck</td>
<td><a href="mailto:daffyduck@abc.edu">daffyduck@abc.edu</a></td>
</tr>
<tr>
<td>HelmNet</td>
<td>ABC University</td>
<td>Mickey</td>
<td>Mouse</td>
<td><a href="mailto:mickeymouse@abc.edu">mickeymouse@abc.edu</a></td>
</tr>
<tr>
<td>MOVEIt</td>
<td>123 University</td>
<td>Minnie</td>
<td>Mouse</td>
<td><a href="mailto:minniemouse@123.edu">minniemouse@123.edu</a></td>
</tr>
<tr>
<td>MOVEIt</td>
<td>123 University</td>
<td>Donald</td>
<td>Duck</td>
<td><a href="mailto:donaldduck@123.edu">donaldduck@123.edu</a></td>
</tr>
<tr>
<td>CBPass_FAD</td>
<td>123 University</td>
<td>Pluto</td>
<td>Dog</td>
<td><a href="mailto:pluto@123.edu">pluto@123.edu</a></td>
</tr>
<tr>
<td>CBPass_Grant_Payment</td>
<td>123 University</td>
<td>Daffy</td>
<td>Duck</td>
<td><a href="mailto:daffyduck@123.edu">daffyduck@123.edu</a></td>
</tr>
<tr>
<td>HelmNet</td>
<td>123 University</td>
<td>Mickey</td>
<td>Mouse</td>
<td><a href="mailto:mickeymouse@123.edu">mickeymouse@123.edu</a></td>
</tr>
<tr>
<td>MOVEIt</td>
<td>123 University</td>
<td>Lite</td>
<td>Happens</td>
<td><a href="mailto:lifehappens@123.edu">lifehappens@123.edu</a></td>
</tr>
</tbody>
</table>
Step 2: Complete User Access Form

If updates are needed, complete a User Access Form – Annual Review reflecting the revisions to your institution’s user accounts.

Do not email the user access form for the annual review but instead, institutions will upload a signed copy in Step 3.
Step 3: Complete Online Verification Form

Complete and submit the required User Access Review - Online Verification Form.

You must verify one of the following:

• **User list is correct:**
  • No changes required
• **User list is incorrect:**
  • Must upload User Access – Annual Review form
2023-24 TASFA

Updates
Memo was sent May 10, 2022:

- Institutions participating in state financial aid programs must accept the data generated by the completion of this online TASFA.
- Institutions may accept the paper TASFA from applicants who do not have access to the necessary technology to complete the online TASFA.
- Institutions can require an applicant to submit additional information with data received on the TASFA.

Texas Administrative Code

| TITLE 10 | EDUCATION |
| PART 1 | TEXAS HIGHER EDUCATION COORDINATING BOARD |
| CHAPTER 22 | STUDENT FINANCIAL AID PROGRAMS |
| SUBCHAPTER A | GENERAL PROVISIONS |
| RULE §22.6 | Applying for State Financial Aid |

(a) Priority deadline:

1. All general academic teaching institutions shall use January 15 as the priority application deadline to receive state financial aid.

2. The priority deadline is not to serve as a determination of eligibility for state financial aid, but otherwise eligible students who apply on or before the deadline shall be given priority consideration for available state financial aid before other applicants.

(b) Texas Application for State Financial Aid (TASFA):

1. The TASFA collects data necessary for determining state financial aid eligibility for those applicants classified as Texas residents, as outlined in Chapter 21, Subchapter B of this Part, who are not eligible to apply for federal financial aid using the Free Application for Federal Student Aid.

2. Beginning with the financial aid application cycle for academic year 2023-2024 and thereafter, the online TASFA available through the ApplyTexas website is the sole, acceptable online TASFA. All institutions participating in financial aid programs covered by this chapter must accept the data generated by the completion of this online TASFA.

3. Beginning with the financial aid application cycle for academic year 2023-2024 and thereafter, the TASFA document available through the ApplyTexas website is the sole, acceptable printable version of the TASFA, which institutions may accept from applicants who do not have access to the necessary technology to complete the online TASFA.

4. An institution is not prohibited from requiring an applicant to submit additional information to accompany the data received via the TASFA.

(c) Authority for this section is provided in Texas Education Code, Chapter 56, Section 56.008 and Chapter 61, Section 61.0762.

Source Note: The provisions of this §22.6 adopted to be effective August 27, 2018, 43 TexReg 5594; amended to be effective May 19, 2022, 47 TexReg 2860

TAC, Title 19, Chapter 22, Subchapter A, Rule 22.6
TASFA Updates

Development

- Refining help icons throughout the application.
- Mirroring the FAFSA questions where possible.

Testing

- Internal user acceptance testing (UAT) is in progress.
- External UAT will be completed over the summer.
- Institutions will be involved in testing of file transmission in MOVEit.
TASFA Updates

Data Transmission

• The TASFA File Layout was sent to institutions May 10, 2022.
  • TASFA FY 2024 File Layout
  • TASFA FY 2024 File Layout Memo

• The TASFA data file will be sent to institutions in a Fixed-Length text format.

• The document was created to mirror the ISIR Record Layout, where possible.

• It includes a header, footer and detailed applicant record to provide the start and end positions for the data collected from each question or input on the TASFA.

• TASFA files will be sent daily using the THECB’s online portal, MOVEit DMZ, to the institution’s dedicated TASFA_Output folder.
The data collected on the TASFA will not be validated by the THECB against external databases.

Applicants will not have the ability to upload or submit documentation using the online TASFA and will need to send corresponding paperwork to the institutions directly.

Once submitted, the application is locked, and corrections cannot be made. An applicant can add more colleges for submission.

Each institution will use the data provided by the THECB to calculate an expected family contribution (EFC).

The THECB will only send applications to the institution that have been signed and submitted; partially completed applications will not be provided.
File Layout Format

Standards for field position types:

- **Numeric Positions** are right justified.
  - If the total positions are not needed for the numeric entry, leading zeros will be included in the file.
    - Example:
      - Field allows 9 numbers to be entered
      - Amount entered by user: $1,000
      - File will include: 000000100

- **Alphanumeric Positions** are left justified.
- **Blank Positions** are left justified.
  - If a field is skipped because it is **Optional** or conditional, blank spaces will be included in the file to account for the applicable positions.
TASFA Data Processing

- It is **not required** that institutions are able to import the data provided in fixed length file by the October 2022 launch.
- File Layout can be used by institutions to **begin** conversations with software vendors to determine future import options.
- The THECB is pursuing additional file formats to transmit data (e.g., .csv format) so schools can consume data more easily.
- A report is also being created to provide institutions a running listing of submitted TASFAs at their institution.
Deadlines and Reminders
Deadlines and Reminders

Deadlines

• 10-Day Review for Preliminary Allocations – June 6, 2022
  • TEXAS Grant, EAE, WSMP, TCWS
• User Access Annual Review – June 10, 2022
• Authority to Transfer – July 1, 2022

Coming Soon

• FY 2023 Additional Program Guidelines
• Exemption and Waiver updates

General Reminders

• Financial Aid Database (FAD) - Cycle Two – First day to submit files – June 15, 2022
• FY 2023 Grant Guidelines posted on SFAP webpage → Program Resources
• Summer Institutional Calendar posted on SFAP webpage → Stay Connected
Contact 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.
Submit a CONTACT US

• To ensure inquiries are routed correctly, complete these steps:
  • Select “Institution” in Received From box
  • Enter the institution’s full name
  • Always select “Financial Aid Question” as the Contact Reason
  • Provide the best direct phone number
Texas Higher Education COORDINATING BOARD

Questions?