

# Texas Transfer Grant Pilot Program

April 27, 2022



# Topics of Discussion



**PROGRAM  
ADMINISTRATION**



**ADDITIONAL  
RESOURCES**



**Q & As**

# Program Administration

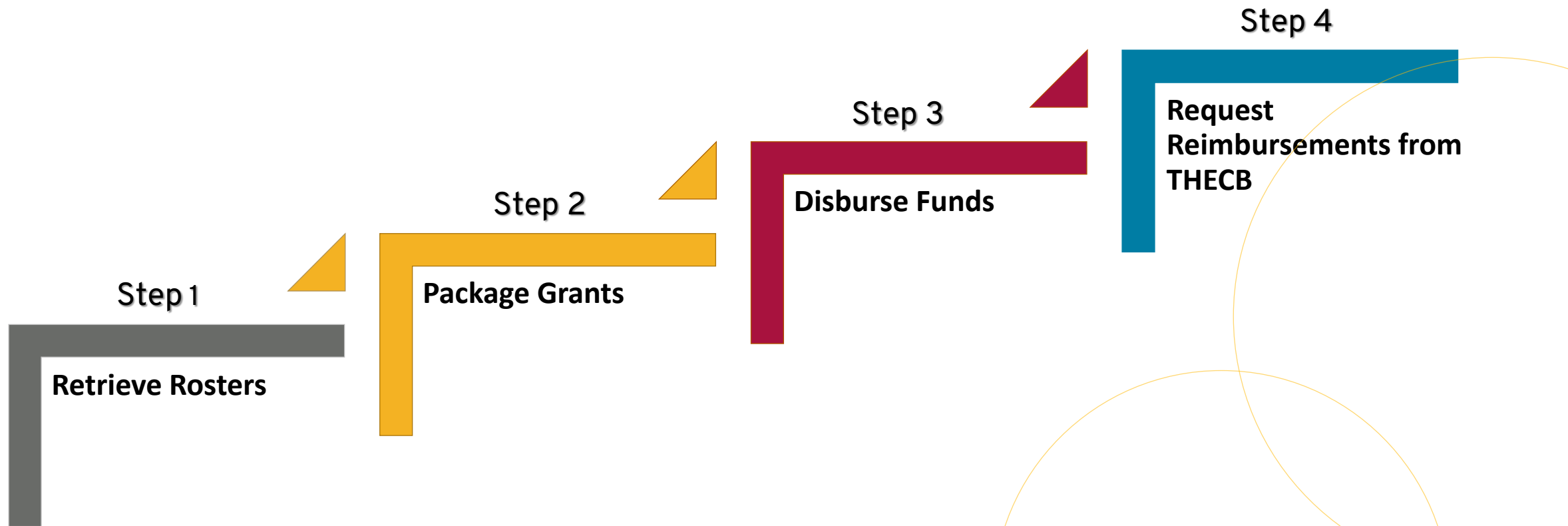
# Purpose of Program

To provide portable need-based aid to high-achieving transfer students who are low-income and to help mitigate financial barriers to vertical transfer for students.

This program is sponsored through the state's additional investment in the federal Governor's Emergency Education Relief (GEER) funds.



# Institutions must complete four essential steps to administer Transfer Grant awards:



# Step 1: RECIPIENT ROSTERS

Rosters may be accessed through the [MOVEit DMZ](#) portal located under the Transfer Grant Folder.

- Roster updates will be made available weekly.

Rosters will contain the recipients:

- First & Last Name
- SSN
- DOB
- Amount of grant
- Semester of use
- Date linked to the institution

- ☐ The date will identify recent additions to the Roster.
- ☐ Rosters will default to the most recent changes on top but can be sorted by “name” .



**A selected student must complete the following to appear on an institution's roster:**

**File the 2022-2023 Free Application for Federal Student Aid (FAFSA).**

# Step 2. Package Grants

Upon receipt of the Recipient Roster, complete the following:

- Apply the grant to the student's financial aid package.
  - Prioritize the Transfer Grant over non-grant forms of aid, such as loans and work-study.

**A Transfer Grant award for fall 2022 must NOT exceed \$5,000 per eligible, enrolled student.**




The amount of this grant **must** not be reduced unless the total amount of the Transfer Grant plus other aid exceeds the student's COA. Reduce loans and work-study prior to reducing Transfer Grants.


# Step 3. Disburse Funds

Upon recipient enrollment of at least 9 SCHs as of the institution's census date, complete the following:

- Disburse grant funds to the student's institutional account.
  - Use “institutional funds” to pay students.



**If an award has been disbursed and a recipient receives assistance that exceeds their COA, the institution is not required to adjust the award unless the sum of the excess resources is greater than \$300.**



# Step 4. Request Reimbursements

To request reimbursement, the certifying official must:

- Confirm eligible recipient enrollment of at least 9 SCHs as of the institution's census date, and
- Submit Certification of Payment totals for expended Transfer Grant awards to the THECB.

Certification of Payments **must** be received by the THECB no later than **Oct. 14, 2022.**

# Additional Resources

# Resources are available on the Student Financial Aid Programs Webpage, under “Grant Programs”.

## Grant Programs

### TOWARD EXCELLENCE, ACCESS AND SUCCESS (TEXAS) GRANT

TEXAS Grant program funds are available to eligible students attending General Academic Teaching Institutions (GATIs) in Texas (excluding Lamar State College-Port Arthur). This program is authorized by [TEC Chapter 56, Section 56.302 Subchapter M](#). Rules establishing procedures to administer the program [TAC, Chapter 22, Subchapter L](#).

- [FY 2022 TEXAS Grant Guidelines \[PDF\]](#)
- [FY 2022 TEXAS Grant Allocations \[PDF\]](#)
- [FY 2021 TEXAS Grant Guidelines \[PDF\]](#)

[Private High School Certification Form for Recommended Curriculum \[PDF\]](#)

### TEXAS EDUCATIONAL OPPORTUNITY GRANT (TEOG)

TEOG program funds are available to eligible students attending community colleges, public state colleges (including Lamar State College-Orange and Lamar public technical institutes. This program is authorized by [TEC, Chapter 56, Section 56.402](#). Rules establishing procedures to administer the program can be found in [Chapter 22, Subchapter M](#).

- [FY 2022 TEOG Guidelines \[PDF\]](#)
- [FY 2022 TEOG Allocations \[PDF\]](#)
- [FY 2023 TEOG Allocations \[PDF\]](#)
- [FY 2021 TEOG Guidelines \[PDF\]](#)

### TUITION EQUALIZATION GRANT (TEG)

TEG program funds are available to eligible students attending a private or independent institution of higher education (See [TEC, Section 61.003\(15\)](#)). This program is authorized by [Chapter 61, Section 61.221](#). Rules establishing procedures to administer the subchapter can be found in [Title 19 of the TAC, Chapter 22, Subchapter B](#).

- [FY 2022 TEG Guidelines \[PDF\]](#)
- [FY 2022 TEG Final Allocations \[PDF\]](#)
- [FY 2023 TEG Initial Allocations \[PDF\]](#)
- [FY 2021 TEG Guidelines \[PDF\]](#)
  - [FY 2021 TEG Engagement Guide \[PDF\]](#)

### TEXAS TRANSFER GRANT PILOT PROGRAM

Transfer Grant program funds are available to eligible students attending General Academic Teaching Institutions (GATIs) in Texas (excluding Lamar State College-Port Arthur). This program is sponsored through the state's additional investment in the federal Governor's Emergency Education Relief (GEER) funds.

- [Texas Transfer Grant Pilot Program Webcast March 24, 2022 \[Video\]](#)
- [Texas Transfer Grant Pilot Program Webcast March 24, 2022 \[PDF\]](#)

### 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) State Grant and Emergency Educational Grant.

<https://www.highered.texas.gov/institutional-resources-programs/student-financial-aid-programs/program-resources/grant-programs/>

Stay connected  
through fact  
sheets, recorded  
webinars, and  
more as resources  
become available.

## TEXAS TRANSFER GRANT PILOT PROGRAM Fact Sheet

Texas Higher  
Education  
COORDINATING BOARD

This fact sheet highlights specific requirements to assist participating institutions with the administration of the Texas Transfer Grant Pilot Program.

### Purpose

To provide portable need-based aid to high-achieving transfer students who are low-income and to help mitigate financial barriers to vertical transfer for students.

This program is sponsored through the state's additional investment in the federal Governor's Emergency Education Relief (GEER) funds and provides a unique opportunity for Texas to test an innovative approach to offering financial support to a critical student population.

### Award Amount

A Transfer Grant award for fall 2022 **must not** exceed \$5,000 per eligible, enrolled student.

The amount of a Transfer Grant **must not** be reduced unless the total amount of the Transfer Grant plus other aid exceeds the student's Cost of Attendance (COA). THECB requests that institutions reduce loan and work-study before reducing Transfer Grants.

### Over Awards

If an award has been disbursed and a recipient receives other assistance that exceeds their COA, the institution **is not** required to adjust the award unless the sum of the excess resources is greater than \$300.

### Eligibility for Disbursement

To be eligible for disbursement of a fall 2022 Texas Transfer Grant, a selected student **must**:

- Be enrolled in a minimum of **9 semester credit hours (SCH)** as of the institution's census day (also referred to as Official Reporting Date - ORD).

## INSTITUTIONS

Eligible public institutions **are required** to complete an **Interagency Contract (IAC)** with the Texas Higher Education Coordinating Board (THECB) to receive funding for the Texas Transfer Grant Pilot Program.

### Program Administration:

Institutions must complete the following steps to administer Transfer Grant awards:

#### STEP 1. RETRIEVE RECIPIENT ROSTERS

- ❑ Retrieve (download) rosters through the [MOVEit DMZ portal](#) in the **Transfer Grant Folder**.
  - Roster updates will be made available to institutions on a weekly basis.

#### STEP 2. PACKAGE GRANTS

- ❑ Apply the grant to the student's financial aid package.
  - Prioritize the Transfer Grant over non-grant forms of aid, such as loans and work study.

#### STEP 3. DISBURSE FUNDS

- ❑ Disburse grant funds on the student's institutional account using institutional funds.

#### STEP 4. REQUEST REIMBURSEMENT

- ❑ To request reimbursement, the certifying official must:
  - confirm eligible recipient enrollment of at least 9 SCHs as of the institution's census date, and
  - submit **Certification of Payment** totals for expended Transfer Grant awards to THECB.

**Note:** A Certification of Payment **must** be received by the THECB no later than **Oct. 14, 2022**.

# Contact Information

# Contacting Student Financial Aid Programs

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

Enter in Description field: Transfer Grant Program

Provide the best direct phone number

**Texas Higher Education Coordinating Board**

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**Contact Us**

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

Received From\* INSTITUTION

Institution

Contact Reason\* \*Financial Aid Question

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\* Dr.

First Name\*

Last Name\*

E-mail\*

Phone (10-digit)  Phone Ext

Mail Address

Mail Address2

Mail Address3

City

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

| [Help](#)

# Questions?