Texas Transfer Grant Pilot Program

September 1, 2022
Topics of Discussion

Program Reminders

Requesting Reimbursement and Returning Funds Overview

Additional Resources

Questions
Program Reminders
# Program Administration

## Awarding

- 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

## Enrollment Eligibility

- Eligible students MUST enroll in at least 9 SCHs as of the institution’s census date.

## Over Awards

- If 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.
Q: Are Transfer Grant funds subject to the Selective Service criteria?

A: Yes. Under Texas Education Code (TEC), Title 3, Section 51.9095, an individual must file a statement of their selective service status with the institution confirming registration or exemption. This statute applies to:

- all state-funded financial aid, and
- federal funds or gifts and grants accepted by this state (including federal aid or private donations that pass through the state Treasury or Governor’s office).
  - I.E., GEER, state-appropriated funds, etc.
Requesting Reimbursement
Requesting Reimbursement

Step One: Download Reimbursement Template

Step Two: Complete Reimbursement Request Form

Step Three: Upload Reimbursement File

Step Four: Submit Reimbursement Request
Step One: Reimbursement Template

<table>
<thead>
<tr>
<th>FICE</th>
<th>SSN</th>
<th>Last Name</th>
<th>First Name</th>
<th>DOB</th>
<th># Hours Enrolled through Census</th>
<th>Disbursed Amount</th>
<th>Semester</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>123456</td>
<td>123456789</td>
<td>Doe</td>
<td>John</td>
<td>19990406</td>
<td>9</td>
<td>$5000.00</td>
<td>Fall 22</td>
<td>ONLY if Disbursed Amount is less than $5000</td>
</tr>
</tbody>
</table>

Enter 6-digit FICE

DOB: YYYYMMDD

SSN: No dashes

Save the file in the following format: 012345_TTGReimbursement_SemesterYYYY

Example: 012345_TTGReimbursement_Fall2022
Step Two: Reimbursement Request Form

Complete **ALL** fields.

- Select **Institution Type**.
- Select **Institution FICE, Name, and Allocation Amount**.
- Enter total **Reimbursement Amount**.
- Enter **Student Count**.

[https://app.smartsheet.com/b/form/3418e02fd85a43edaa3c152b68f39e94](https://app.smartsheet.com/b/form/3418e02fd85a43edaa3c152b68f39e94)
Step Three: Upload Reimbursement File

- Click **browse files**, or
- Drag and drop a copy into the file upload box

Example: 012345_TTGReimbursement_Fall2022

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Step Four: Submit Request

- Click the box above the submit button to receive a copy of your responses
- Click **Submit** to send the form to the THECB

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Submission Deadline

Requests for reimbursements must be received by the THECB no later than Oct. 14, 2022.
Returning Funds
Return of Funds Form (RFF)

Complete all required fields.

- FICE
- Institution Name
- Contact Information
- Award Year
- Program
- Amount
- Number student awards being refunded
- Detailed refund explanation (including student full Name, SSN, and DOB impacted by the refund)
- Name/Title of Certifying Official
- Date
- Click Submit

Grants and Special Programs

https://www1.thecb.state.tx.us/apps/SpecialPrograms/returnfunds.cfm
Additional Resources
The Texas Transfer Grants Pilot Program provides portable, need-based grant aid to encourage high-achieving students to transfer from Texas public two-year to participating Texas public four-year institutions of higher education (IHEs). The program was developed by the Texas Higher Education Coordinating Board (THECB) and is funded by the U.S. Department of Education’s Governor’s Emergency Education Relief (GEER) Fund. MDRC, a non-profit social policy research organization, is assisting the THECB with the design, implementation, and assessment of the grant program.

Texas Transfer Grant recipients are being offered a one-time $5,000 grant to transfer to any participating Texas public four-year IHE of their choice, including public universities and select health-related institutions (HRIs). For a full list of participating institutions, see below. The grant will be incorporated in eligible recipients’ financial aid packages upon successful transfer for the Fall 2022 semester.

More information can be found at the following websites:

- [Texas Transfer Grants Pilot Program Webcast – September 1, 2022](https://www.texastransfergrants.org/)
- [Texas Higher Education Coordinating Board](https://www.highered.texas.gov/institutional-resources-programs/student-financial-aid-programs/grant-programs/)
- [Texas Transfer Grant Pilot Program](https://www.texastransfergrants.org/)

For more information, contact the Texas Higher Education Coordinating Board at (800) 652-3940 or [highered@theCB.state.tx.us](mailto:highered@theCB.state.tx.us).
Texas Transfer Grant Pilot Program Webcast – September 1, 2022

Program Resources

TEXAS TRANSFER GRANT PILOT PROGRAM

FACT SHEET

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 government’s Emergency Education Relief (EER) funds and provides a unique opportunity for Texas to put an innovative approach to offering financial support to a critical student population.

Award Amount

A Transfer Grant award for fall 2022 must not exceed $3,000 per eligible, enrolled student.

The amount of a Transfer Grant must not exceed the total amount of the Transfer Grant plus all other awards excluding the student’s Cost of Attendance (COA). The COA requests that institutions reduce loan and work-study before reducing Transfer Grants.

Over Awards

If an award has been disclosed and a recipient receives another assistance that exceeds their COA, the institution must adjust the award unless the sum of the excess resources is greater than $500.

Eligibility for Enrolment

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

- enroll in a minimum of 9 semester credit hours (SCCH) as of the institution’s census day (also used for Official Reporting Code – ORCD)

INSTITUTIONS

Eligible public institutions are required to complete an Interagency Contract (DAZ) 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 IDENTIFIERS

- Retrieve identified recipient from the Moveit DMZ website.

STEP 2: PACKAGE GRANTS

- Apply the grant to the student’s financial aid package.

STEP 3: DISBURSE FUNDS

- Disburse grant funds to the student’s institutional account using institutional funds.

Step 4: REQUEST REIMBURSEMENT

- To request reimbursement, the certifying official must:
  - complete and sign electronic disbursement form.
  - sign the certification of payment.

- The reimbursement request must be received by THECB by the deadline.

- Certification of Payment must be received by THECB to ensure receipt.

- If no reimbursement is received by the deadline, the grant is considered unspent.

- The grant is held at 30 days and approved for reimbursement.

- Disbursement - Enter comments ONLY if the disbursement amount is less than the $5,000 awarded amount.

TEXAS TRANSFER GRANT PILOT PROGRAM

Requesting Reimbursement and Returning Funds

This resource document gives eligible public institutions step-by-step instructions on how to complete the 2022-23 $5,000 Texas Transfer Grant Reimbursement Template.

A. Enter the following for the requesting institution:

- OId Name
- Institution state
- Institution City
- Institution zip code

B. Enter the following identifiers for all recipients:

- Institution 4-digit
- SSN (no dashes)
- Last Name
- First Name
- Institution Code
- Institution 4-digit
- Example: 012345

C. Recipient MUST have been enrolled in at least 9 semester credit hours (SCCH) through census to request reimbursement.

- Disbursement Amount
- Semester (2-digit)
- Disbursement Date
- Notes
- Certification of Payment

D. Step 5: DISBURSEMENT

- Certification of Payment
- Enters comments ONLY if the disbursement amount is less than the $5,000 awarded amount.

- Save file in the following format: 6-digit_PCE/TTGRulement_SemesterYYYY

- Example: 012345_0911Reimbursement_2022
Texas Transfer Grant

Program Resources

Archived Webcasts

Transfer Grant FAQs

Texas Transfer Grant Frequently Asked Questions

General Transfer Grant Administration Questions

+ If institutions disburse funds 10 days prior to their census date, typically the second week of school, the student may NOT be required to withdraw this grant.

+ Should institutions pull back this grant?

+ To confirm, this grant can exceed a student’s financial need if it does not go over the cost of attendance (COA) by $300 (covered in FAQ 2).

+ Are these funds subject to the Selective Service criteria since institutions will initially disburse the grant using institutional funds?

+ Can a student receive both the TEXAS Grant and the Transfer Grant in the same semester/term?

+ Can these funds count towards TEXAS Grant matching funds?

+ Should these funds be disbursed like the Reskilling and/or GEER emergency funds so they will not impact current or future aid?

+ Will the Transfer Grant have to be reported on the Financial Aid Database (FAD) report?

+ An institution disbursed funds to a student meeting the enrollment requirement at census, but six weeks later, fully withdraws the student from the institution. What portion of the grant?

https://www.highered.texas.gov/institutional-resources-programs/student-financial-aid-programs/program-resources/grant-programs/transfer-grant-faq9/
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.
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
Questions?