

2018-19 Program Guidelines



**STUDENT FINANCIAL AID PROGRAMS
TEXAS HIGHER EDUCATION COORDINATING BOARD**

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TOWARD EXCELLENCE, ACCESS AND SUCCESS GRANT

The Texas Higher Education Coordinating Board (THECB) Program Guidelines are intended to support institutions by highlighting requirements that appear in the Texas Education Code (TEC) and Title 19 of the Texas Administrative Code (TAC). When administering this program, institutions should always refer to the applicable statutes and rules. The information provided in this document is to be used solely as a resource and does not supersede the statute and/or rules for this program.

PROGRAM AUTHORITY AND PURPOSE ([19 TAC, SECTION 22.225](#))

The Toward EXcellence, Access, & Success (TEXAS) Grant program is authorized by [TEC Chapter 56, Section 56.302 Subchapter M](#). Rules establishing procedures to administer the program can be found in [Title 19 of the TAC, Chapter 22, Subchapter L](#). The program is funded by appropriations authorized by the Texas Legislature and from various revenue sources and gifts to the program. The purpose of the TEXAS Grant program is to provide financial aid assistance to enable eligible students to attend public institutions of higher education in this state.

STATE PRIORITY DEADLINE ([TEC, SECTION 56.008 AND 19 TAC, SECTION 22.6](#) – Formerly: 19 TAC, 21.10)

The THECB provides a uniform priority deadline for applications that qualify for financial assistance in an academic year. General Academic Teaching Institutions (GATIs) in Texas **must** publicize and use **March 15** as the state priority deadline for identifying eligible students to be given priority in receiving awards through the state financial aid programs. All other public institutions are *encouraged* to use this state priority deadline. Institutions may define how their students must meet the priority deadline. Institutions are encouraged to adopt a policy and procedure to ensure students are awarded consistently for this program.

! ALERT NEW: Beginning with the 2019-20 academic year and all years thereafter, all GATIs in Texas **must** publicize and use **January 15** as the state priority deadline.

NOTE: The 2019-20 Free Application for Federal Student Aid (FAFSA) and Texas Application for State Financial Aid (TASFA) will use **January 15, 2019** as the state priority deadline date.

ELIGIBLE INSTITUTIONS ([19 TAC, SECTION 22.227](#))

With the exception of public state colleges, GATIs and Health-Related Institutions (HRIs) are eligible to make both initial year (IY) and renewal year (RY) awards from a single allocation. Community colleges, public state colleges, and public technical institutes may only issue an RY awards to students who received an IY award prior to fall 2014 through a community college, public state college, or public technical institute.

ELIGIBILITY

INITIAL ELIGIBILITY REQUIREMENTS ([19 TAC, SECTION 22.228](#))

TO RECEIVE AN IY AWARD, A STUDENT MUST:

- ✓ Be classified by the institution as a Texas resident
- ✓ Be registered with Selective Service, or be exempt
- ✓ Have applied for any available financial aid assistance
- ✓ Have financial need
- ✓ Have a 9-month expected family contribution (EFC) of no more than \$5,609
- ✓ Be enrolled at least 3/4 time
- ✓ Not have earned a baccalaureate degree
- ✓ Be enrolled in a baccalaureate degree program at a public 4-year or HRI institution as a first-time undergraduate and qualify through one of the following four pathways:
 - **High School Graduation Pathway:** Graduation from an accredited public or private high school* in Texas and enrollment at an approved institution within 16 months after high school graduation. The student must not have accumulated more than 30 semester credit hours (SCHs) (excluding credits for dual enrollment or by examination); **OR**
 - **Associate Degree Pathway:** Enrollment in an eligible institution within 12 months after earning an associate degree from a public or private nonprofit Texas institution of higher education ; **OR**
 - **Honorable Military Discharge Pathway:** Enrollment in an eligible institution of higher education within 12 months after being honorably discharged from military service. Enlistment in the military must have occurred within 12 months after graduation from an accredited public or private high school in Texas on May 1, 2013 or later; **OR**
 - **TEOG Transfer Pathway:** Completion of at least 24 SCHs with a minimum 2.5 GPA after receiving an IY Texas Educational Opportunity Grant (TEOG) in Fall 2014 or later and transferring to an eligible institution with a minimum 2.5 GPA.
- ✓ Not have been convicted of a felony or crime involving a controlled substance or under the law of any jurisdiction involving a controlled substance as defined by [Chapter 481, Health and Safety Code](#) (Texas Controlled Substances Act)

*To determine eligibility for a student that graduated from a private high school in Texas, the institution of higher education must receive a certification form from the private high school. This form verifies that the student completed the equivalent of the required high school curriculum. The [private high school certification form](#) is located on the THECB's website.

ADDITIONAL INFORMATION

HIGH SCHOOL RECIPIENT

Home-schooled students are not eligible for an initial award though the **High School Graduation Pathway**. Only students who graduated from an accredited public or private high school* in Texas are eligible for TEXAS Grant consideration as an initial applicant.

INITIAL RECIPIENT

If an initial TEXAS Grant recipient is paid funds but is later selected for verification (or voluntarily submits documentation) resulting in a new EFC that exceeds the maximum (\$5,609) requirement, the award must be cancelled. Funds should be awarded to another eligible student when possible.

TRANSFER STUDENTS

A student who is eligible through either the **Associate Degree** or **TEOG Transfer Pathway** does not need to have his or her high school transcripts evaluated, but cannot receive priority consideration for an initial TEXAS Grant award.

RENEWAL ELIGIBILITY REQUIREMENTS (19 TAC, SECTION 22.228)

TO RECEIVE AN RY AWARD, A STUDENT MUST:

- ✓ Be classified by the institution as a Texas resident
- ✓ Be registered with Selective Service, or be exempt
- ✓ Have financial need
- ✓ Be enrolled at least 3/4 time
- ✓ Maintain satisfactory academic progress
- ✓ Not have earned a baccalaureate degree
- ✓ Be a prior recipient of a TEXAS Grant award who is an undergraduate enrolled at a public institution who qualifies through one of the following three pathways:
 - Is enrolled as an undergraduate at a public 2-year institution and previously received a TEXAS Grant IY award **prior** to fall 2014 at a public 2-year institution;
OR
 - Is enrolled as an undergraduate in a baccalaureate program at a public 4-year institution or HRI and previously received a TEXAS Grant IY award **prior** to fall 2014 at a public 2-year institution, 4-year public institution, or HRI ;
OR
 - Is enrolled as an undergraduate in a baccalaureate program at a public 4-year institution or HRI and received a TEXAS Grant IY award in fall 2014 or later.
- ✓ Not have been convicted of a felony or crime involving a controlled substance or under the law of any jurisdiction involving a controlled substance as defined by [Chapter 481, Health and Safety Code](#) (Texas Controlled Substances Act)

ADDITIONAL INFORMATION

NEED ELIGIBILITY

If the student receives assistance that was not considered when determining the calculated need and the resulting sum of the assistance causes the student's need to be exceeded, the TEXAS Grant award must be adjusted if the sum of the excess resources is greater than \$300.

GRADUATE HOURS

An undergraduate student who is enrolled in both graduate and undergraduate hours is eligible for a TEXAS Grant award if all other eligibility requirements are met and the combined number of hours meets the 3/4 time enrollment condition.

SELECTIVE SERVICE STATEMENT (19 TAC, SECTION 22.3)

! ALERT NEW: STUDENT COMPLIANCE WITH SELECTIVE SERVICE

A male student cannot receive a grant, scholarship, loan or other financial assistance funded by state revenue, unless a statement of the individual's selective service status is completed with the institution or other entity granting or guaranteeing the financial assistance. This requirement also includes federal funds or gifts and grants accepted by this state and any loans guaranteed by the state of Texas (See [TEC, 51.9095](#)).

Typically, a student's selective service status is confirmed through the online FAFSA process which validates registration directly with the Selective Service Administration. If a student's selective service status is confirmed on the Institutional Student Information Record (ISIR), no statement needs to be collected by the institution.

The statement below **must** be collected for all male applicants, each academic year, in the following situations:

- A FAFSA that that is flagged "not registered" must be reviewed by the institution to determine if the student is exempt and may be eligible for federal or state financial aid programs. If the student is **exempt**, additional documentation should be collected by the institution to verify the circumstances. The institution can determine what additional documentation to collect for this verification.
- For a student that does not complete a FAFSA, the required statement and back-up documentation must be collected by the institution to verify the current selective service status if the individual is applying for any state financial aid.

NOTE: The institution has discretion to determine how to collect this required statement, which can be done electronically or on paper (e.g. online form, signed award letter, etc.). The statement and all documentation must be retained in the student's record and be made available if requested during a program review or audit. Each statement collected must be retained with the student's records for 7 years after the date of completion for the applicable award period (See [TAC, Section 22.4\(a\)\(2\)\(A\)](#)).

Required Statement of Selective Service Status

Are you currently registered for Selective Service, as required by federal law?

Registered (Proof of registration required) Not Registered Exempt (Documentation required)

I, _____, hereby certify that the selective service status provided is true and correct. I understand that I must provide documentation if requested by my institution that I may be required to complete a new statement for each academic year for continued eligibility.

Student Signature

Date

CONTROLLED SUBSTANCE RESTRICTIONS (19 TAC, SECTION 22.230)

A person is not eligible to receive an IY or RY TEXAS Grant if the person has been convicted of a felony or an offense under Chapter 481, Health and Safety Code (Texas Controlled Substances Act), or under the law of any other jurisdiction involving a controlled substance as defined by Chapter 481, Health and Safety Code, unless the person has met the other applicable eligibility requirements under this subchapter and has:

1. Received a certificate of discharge by the Texas Department of Criminal Justice or a correctional facility or completed a period of probation ordered by a court, and at least two years have elapsed from the date of the receipt or completion; **or**
2. The student has been pardoned or the record of the offense has been expunged from the student’s record and therefore the student has been released from the resulting ineligibility to receive a TEXAS Grant.

Institutions are required to collect a statement (electronic or paper) from each TEXAS Grant recipient prior to the disbursement of funds confirming eligibility in regard to the controlled substance restrictions of the program. This statement must be retained with the student’s records at the institution and be made available if requested in the course of a program review or audit. Each statement collected must be retained with the student’s records for 7 years after the date of completion for the applicable award period (See [TAC, Section 22.4\(a\)\(2\)\(A\)](#)).

As long as a statement can be produced to prove a recipient’s eligibility for a given award period, the institution has the flexibility to determine the wording of the statement and the frequency with which it is collected. The institution can require all TEXAS Grant recipients to complete the statement every year they receive a TEXAS Grant award. The institution can also choose to collect the statement at least once from each TEXAS Grant recipient at the institution and word the statement in such a way to indicate that by signing, the student agrees that it is his/her responsibility to inform the institution if his/her status changes in the future. By choosing the second option, the institution can limit the statement required each year to initial or incoming recipients at the institution.

A **sample** statement is being provided:

Statement of Student Eligibility

Have you ever been convicted of a felony or an offense under Chapter 481, Health and Safety Code (Texas Controlled Substances Act), or under the law of another jurisdiction involving a controlled substance as defined by Chapter 481, Health and Safety Code?

_____ Yes* _____ No**

* If your answer is yes, contact the financial aid office to determine your eligibility to receive a TEXAS Grant.
** If your answer is no, it is your responsibility to inform the financial aid office if this status changes at any time while attending the institution.

I hereby certify that the information I have provided in this statement is true and correct. I understand that if I fail to provide accurate information, I may be required to reimburse the institution and penalties may be imposed. I also understand that it is my responsibility to inform the financial aid office if my status concerning this statement of eligibility changes at any time while attending this institution.

Student Signature

Date

DISCONTINUATION OF ELIGIBILITY ([19 TAC, SECTION 22.230](#))

Unless an extension of eligibility (due to a hardship circumstance) is granted, a student’s eligibility ends if any of the following maximums have been met, or the student earns a baccalaureate degree, whichever comes first.

PATHWAY	IF ENROLLED IN A DEGREE PLAN OF 4 YEARS OR LESS	IF ENROLLED IN A DEGREE PLAN OF MORE THAN 4 YEARS	ATTEMPTED HOURS**	HOURS WHILE RECEIVING GRANT FUNDS
INITIAL RECIPIENT BY: <ul style="list-style-type: none"> • ASSOCIATE DEGREE 	3 years from the first semester awarded	4 years from the first semester awarded	150 SCH	90 SCH No hardship allowed
INITIAL RECIPIENT BY: <ul style="list-style-type: none"> • HIGH SCHOOL GRADUATE • TEOG TRANSFER • MILITARY DISCHARGE 	5 years from the first semester awarded	6 years from the first semester awarded	150 SCH	150 SCH No hardship allowed

****Attempted hours** is defined as every course in every semester for which a student has been registered as of the official census date. This includes, but is not limited to, repeated courses, courses the student drops, or those from which the student withdraws. Transfer hours and hours for optional internship and cooperative education courses are included if they are accepted by the receiving institution as counting towards the student's current program of study (See [19 TAC, Section 22.230](#)).

HARDSHIP PROVISIONS ([19 TAC, SECTION 22.231](#))

A student who is ineligible for a TEXAS Grant based on the requirements for the grade point average (GPA), number of completed hours, or total hours enrolled may be deemed eligible under a hardship provision. Each institution must adopt a hardship policy and have the policy available for public review. All hardship decisions must be documented in the student’s record and be available for submission to the THECB, if requested.



STOP: A prorated award may be issued to a student who is enrolled in six to eight hours in the last semester of his or her degree program. However, no student enrolled for fewer than six hours may receive a TEXAS Grant award, regardless of the circumstances including graduation.

SATISFACTORY ACADEMIC PROGRESS (SAP) (19 TAC, SECTION 22.229)

At the end of the first academic year, a student must meet SAP requirements set by the institution to be eligible for a first RY award.

At the end of the second academic year, and all subsequent years, a student must have completed 24 SCHs and have a minimum 2.5 cumulative GPA.

The chart below reflects these requirements, which must be monitored to ensure compliance:

ACADEMIC YEAR	SAP REQUIREMENTS	
END OF 1ST ACADEMIC YEAR	Institution SAP policy	
END OF 2ND ACADEMIC YEAR AND ALL SUBSEQUENT YEARS	Complete 24 SCH	2.5 cumulative GPA on a 4-point scale

AWARDING

! ALERT NEW: ELIMINATION OF REALLOCATION PROCESS

Beginning in the 2018-19 award year, institutions will now have until the close of business on **August 1** (or the first working day thereafter if it falls on a weekend or holiday) to request program funds. The prior process in February will no longer be used to reallocate grant funding.

Each biennium*, funds not requested in the first year can be rolled-over for use in the second. However, funds for the second year of the biennium cannot be requested in advance during the first. Any funds not requested in the second year of the biennium become available for grant processing determined by the THECB.

**A biennium is defined as a two-year period designated to spend appropriated funds by the Legislature to be allocated to the institutions.*

If allocated funds are insufficient to award all eligible students, first priority must be given to students who are eligible for an RY award (See [19 TAC, Section 22.232](#)).

After all eligible RY awards have been funded; remaining allocations should be awarded to IY students in a manner that acknowledges the Priority Model and priority deadline expectations:

- Students meeting the Priority Model requirements who also meet the March 15 state priority deadline should be awarded first.
- If funding remains, the next students to be awarded are those who met the March 15 state priority deadline, but who did not meet the Priority Model requirements.
- The balance of remaining funding can be awarded to any eligible student.

In determining who should receive an IY TEXAS Grant award, an institution must give highest priority to students who demonstrate the greatest financial need at the time the award is made (See [19 TAC, Section 22.233](#)).

ADDITIONAL INFORMATION

GPA APPEALS

A student who does not meet the GPA requirement at the end of a spring term may appeal to have courses taken at other institutions included in the GPA calculation. In this case, all grade points previously earned must be included in the overall GPA calculation.

FIRST YEAR APPEALS

If a student completes the first year on academic warning, probation, or on an approved plan, the student can be considered meeting SAP, if the institution’s policy includes such provisions. However, at the end of the second year, the student must meet the program SAP requirements for continued eligibility.

FAILING COURSES

The intent of the 24 SCH requirement is to encourage timely progression towards a degree. Since a grade of **F** is not earned toward a degree, it should not be considered when calculating the student completed hours.

Institutions are encouraged to use the target award amounts to assist as many students as possible.

TEXAS GRANT 2018-19 AWARD MAXIMUMS				
INSTITUTION TYPE	YEAR MAX	SEMESTER MAX	TARGET YEAR MAX	TARGET SEMESTER MAX
PUBLIC UNIVERSITIES, HRIS	\$9,348	\$4,674	\$5,000	\$2,500
PUBLIC STATE COLLEGES	\$5,862	\$2,931	\$5,000	\$2,500
PUBLIC TECHNICAL INSTITUTES	\$5,590	\$2,795	\$2,500	\$1,250
PUBLIC COMMUNITY COLLEGES	\$3,150	\$1,575	\$1,325	\$663

PRIORITY AWARD MODEL REQUIREMENTS (19 TAC, SECTION 22.228)

To receive priority consideration for an IY award through the TEXAS Grant program, an eligible student must meet at least **one** high school graduation requirement in **at least two** of the following **four** areas:

AREA	HIGH SCHOOL GRADUATION REQUIREMENTS
ADVANCED ACADEMIC PROGRAM	<ul style="list-style-type: none"> 12 Hours of College Credit (Dual Credit or AP Courses), Complete the Recommended or Advanced High School Program or its equivalent Complete the International Baccalaureate (IB) Program
TSI READINESS	<ul style="list-style-type: none"> Meet the Texas Success Initiatives (TSI) assessment thresholds or qualify for an exemption
CLASS STANDING	<ul style="list-style-type: none"> Graduate in the top 1/3 of the HS graduating class Graduate with a GPA of at least 3.0 on a 4-point scale or the equivalent
ADVANCED MATH	<ul style="list-style-type: none"> Complete at least one math course beyond Algebra II Complete at least one advanced career and technical or technical applications course, as determined by the Texas Education Agency (TEA)

ADDITIONAL INFORMATION

PRIORITY

There is no hierarchy within the priority model areas. However, there is a priority deadline of March 15th. Institutions are required to give priority for IY TEXAS Grant funds to students meeting the priority model requirements and the priority deadline. If funds remain after all eligible priority students meeting the priority deadline have been awarded, the balance of funds can go to students meeting the basic requirements.

MATCHING

A student who is a recipient of both a TEXAS Grant and Exemption/Waiver, owes a decreased amount of tuition and fees. Institutions are required to cover, with matching funds, only the balance of tuition and fees not covered by TEXAS Grant.

For example:

An institution would not be required to provide matching funds in excess of the TEXAS Grant award for a student who is exempt from the total cost of tuition and fees.

REQUIRED MATCHING (19 TAC, SECTION 22.234)

Institutions are required to cover any tuition and required fees that are not covered by the amount of the TEXAS Grant using other funds, which may include any non-loan program funds awarded to the student from federal, state, institutional, or outside sources. Funds used for this purpose are frequently referred to as “matching funds”.

! ALERT NEW: A **Required Fee**, for the purpose of administering the TEXAS Grant Program, includes mandatory fees (required by statute) or discretionary fees (authorized by statute, imposed by the governing board of an institution) and fees that an institution charges to a student as a condition of enrollment at the institution or in a specific course.

OVER AWARDS (19 TAC, SECTION 22.234)

If an award has been disbursed and a student receives other assistance that exceeds the student’s financial need, the institution is not required to adjust the award unless the sum of the excess resources is greater than \$300.

LATE DISBURSEMENTS (19 TAC, SECTION 22.235)

Funds that are disbursed after the end of a student’s period of enrollment must be used either to pay the student’s outstanding balance for the period of enrollment, or to make a payment on an outstanding loan received during that period of enrollment. Under no circumstances should funds be released directly to the student in this situation.

PRORATION (19 TAC, SECTION 22.234)

Award amounts must be prorated under the following circumstances:

- Student is enrolled less than 3/4 time, but at least 1/2 time, with an extension of eligibility (due to a hardship circumstance).

HARDSHIP PRORATION SCHEDULE	Divide the maximum award for the semester by 12 and multiply by the number of hours enrolled (6-8 hours)
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- The balance of either total attempted hours **or** eligible program hours while receiving grant funds is less than the total number of hours the student is enrolled.

BALANCE OF TOTAL ATTEMPTED HOURS (150 SCH)	Balance of hours = 6-8 hours: 50% of the maximum award Balance of hours = 1-5 hours: 25% of the maximum award
BALANCE OF ELIGIBLE PROGRAM HOURS (150 OR 90 SCH)	

For Example: A student has 147 hours and 3 eligible hours remaining. The 3 hours would be prorated using the chart above.

PROCESSING FUNDS

REQUESTING PROGRAM FUNDS

When requesting funds, institutions must submit a [Funds Request Form \(FRF\)](#). This form is available through the secure Coordinating Board Pass System (CBPASS) portal on the Student Financial Aid Programs Information Webpage.

RETURNING PROGRAM FUNDS

A [Return of Funds Form \(RFF\)](#) must be submitted and approved before any funds are returned to the THECB. This form is available on the Student Financial Aid Programs Information Webpage under **Online Resources**.





STOP: TIMELY DISTRIBUTION OF FUNDS ([19 TAC, Section 22.2](#))

- Institutions have 3 business days after receiving the funds to apply the funds to a student’s account
- Institutions have 6 business days after receiving the funds to return undisbursed funds
- Institutions have 45 calendar days from the date a student becomes ineligible to return disbursed funds
- Institutions have 120 calendar days to return funds after a student has notified the institution of a decision to cancel the award

AUTHORITY TO TRANSFER FUNDS ([19 TAC, SECTION 22.239](#))

! ALERT: Institutions participating in TEXAS Grant and Texas College Work-Study (TCWS) may transfer up to 10% of the institution’s total annual program allocation or \$20,000 (whichever is less) between programs within the relevant fiscal year. Institutions requesting a transfer between programs must submit an [Authority to Transfer Form](#) by **January 18**.

If the institution transfers TEXAS Grant funds to TCWS, the transferred TCWS funds must be encumbered by **February 20**. If funds are being transferred from TCWS to TEXAS Grant, the institutions must first return the TCWS funds to the THECB by **January 18** but will have until **August 1** to request the transferred funds.

FROM	TO	Deadline to Encumber
TEXAS Grant TEOG TEG	 TCWS	FEBRUARY 20
TCWS	 TEXAS Grant TEOG TEG	AUGUST 1

OR

Funds can only be transferred from a grant to TCWS or vice versa, never from a grant to a grant.



TEXAS EDUCATIONAL OPPORTUNITY GRANT

The Texas Higher Education Coordinating Board (THECB) Program Guidelines are intended to support institutions by highlighting requirements that appear in the Texas Education Code (TEC) and Title 19 of the Texas Administrative Code (TAC). When administering this program, institutions should always refer to the applicable statutes and rules. The information provided in this document is to be used solely as a resource and does not supersede the statute and/or rules for this program.

PROGRAM AUTHORITY AND PURPOSE ([19 TAC, SECTION 22.253](#))

The Texas Educational Opportunity Grant (TEOG) program is authorized by [TEC, Chapter 56, Section 56.402](#). Rules establishing procedures to administer the program can be found in [Title 19 of the TAC, Chapter 22, Subchapter M](#). The program is funded by appropriations authorized by the Texas Legislature. The purpose of the TEOG program is to provide financial aid assistance to enable eligible students to attend two-year public institutions of higher education in Texas.

STATE PRIORITY DEADLINE ([TEC, SECTION 56.008](#) AND [19 TAC, SECTION 22.6](#) – Formerly: 19 TAC, 21.10)

The THECB provides a uniform priority deadline for applications that qualify for financial assistance in an academic year. Institutions eligible to participate in the TEOG program are *encouraged* to publicize and use the **March 15** state priority deadline for identifying eligible students to be given priority in receiving awards through the state financial aid programs. Institutions may define how their students must meet the priority deadline. Institutions are encouraged to adopt a policy and procedure to ensure students are awarded consistently for this program.

! ALERT NEW: Beginning with the 2019-20 academic year and all years thereafter, all General Academic Teaching Institutions (GATIs) in Texas **must** publicize and use **January 15** as the state priority deadline. All other public and private/independent institutions are encouraged to use this deadline.

NOTE: The 2019-20 Free Application for Federal Student Aid (FAFSA) and Texas Application for State Financial Aid (TASFA) will use **January 15, 2019** as the state priority deadline date.

ELIGIBLE INSTITUTIONS ([19 TAC, SECTION 22.255](#))

Community colleges, public state colleges and public technical institutes are eligible to make initial year (IY) and renewal year (RY) awards. Each eligible institution will have a single allocation each fiscal year to make both IY and RY awards.

ELIGIBILITY

ELIGIBILITY REQUIREMENTS ([19 TAC, SECTION 22.256](#))

TO RECEIVE AN IY AWARD, A STUDENT MUST:	TO RECEIVE AN RY AWARD, A STUDENT MUST:
<ul style="list-style-type: none"> ✓ Be classified by the institution as a Texas resident ✓ Be registered with Selective Service, or be exempt ✓ Have applied for any available financial aid assistance ✓ Have financial need ✓ Have a 9-month expected family contribution (EFC) of no more than \$5,609 ✓ Be enrolled at least 1/2 time as an undergraduate student in an associate degree or certificate program at a 2-year institution ✓ Not have accumulated more than 30 semester credit hours (SCH) (excluding credits for dual enrollment or by examination) ✓ Not have earned an associate or baccalaureate degree ✓ Not be concurrently receiving TEXAS Grant ✓ Not have been convicted of a felony or crime involving a controlled substance or under the law of any jurisdiction involving a controlled substance as defined by Chapter 481, Health and Safety Code (Texas Controlled Substances Act) 	<ul style="list-style-type: none"> ✓ Be classified by the institution as a Texas resident ✓ Be registered with Selective Service, or be exempt ✓ Be a previous TEOG initial award recipient ✓ Have financial need ✓ Be enrolled at least 1/2 time as an undergraduate student in an associate degree or certificate program at a 2-year institution ✓ Maintain satisfactory academic progress ✓ Not have earned an associate or baccalaureate degree ✓ Not be concurrently receiving TEXAS Grant ✓ Not have been convicted of a felony or crime involving a controlled substance or under the law of any jurisdiction involving a controlled substance as defined by Chapter 481, Health and Safety Code (Texas Controlled Substances Act)

ADDITIONAL INFORMATION

EFC REQUIREMENT

IY awards can only be made to students that have an EFC of \$5,609 or less (9-month EFC). RY awards can be made to eligible students with EFCs higher than \$5,609 if the student has a calculated need. A TEOG award cannot exceed a student's calculated financial need.

TEOG AND TEXAS GRANT IN THE SAME AWARD YEAR

A student may receive a TEOG and TEXAS Grant award during the same award year, if both awards are not received for the same semester or term.

Example:

Student attends a public community college in the fall and receives a TEOG award but transfers to a public university in the spring. A TEXAS Grant can be awarded for the spring semester.

GED

A student who received a GED can be considered eligible for a TEOG if the student is admitted for enrollment as an entering regular student in the first 30 SCHs of an associate degree or certificate program.

SELECTIVE SERVICE STATEMENT (19 TAC, SECTION 22.3)

! ALERT NEW: STUDENT COMPLIANCE WITH SELECTIVE SERVICE

A male student cannot receive a grant, scholarship, loan or other financial assistance funded by state revenue, unless a statement of the individual's selective service status is completed with the institution or other entity granting or guaranteeing the financial assistance. This requirement also includes federal funds or gifts and grants accepted by this state and any loans guaranteed by the state of Texas (See [TEC, 51.9095](#)).

Typically, a student's selective service status is confirmed through the online FAFSA process which validates registration directly with the Selective Service Administration. If a student's selective service status is confirmed on the Institutional Student Information Record (ISIR), no statement needs to be collected by the institution.

The statement below **must** be collected for all male applicants, each academic year, in the following situations:

- A FAFSA that that is flagged "not registered" must be reviewed by the institution to determine if the student is exempt and may be eligible for federal or state financial aid programs. If the student is **exempt**, additional documentation should be collected by the institution to verify the circumstances. The institution can determine what additional documentation to collect for this verification.
- For a student that does not complete a FAFSA, the required statement and back-up documentation must be collected by the institution to verify the current selective service status if the individual is applying for any state financial aid.

NOTE: The institution has discretion to determine how to collect this required statement, which can be done electronically or on paper (e.g. online form, signed award letter, etc.). The statement and all documentation must be retained in the student's record and be made available if requested during a program review or audit. Each statement collected must be retained with the student's records for 7 years after the date of completion for the applicable award period (See [TAC, Section 22.4\(a\)\(2\)\(A\)](#)).

Required Statement of Selective Service Status

Are you currently registered for Selective Service, as required by federal law?

Registered (Proof of registration required)
 Not Registered
 Exempt (Documentation required)

I, _____, hereby certify that the selective service status provided is true and correct. I understand that I must provide documentation if requested by my institution that I may be required to complete a new statement for each academic year for continued eligibility.

Student Signature _____
Date

CONTROLLED SUBSTANCE RESTRICTIONS (19 TAC, SECTION 22.256)

A person is not eligible to receive an IY or RY TEOG if the person has been convicted of a felony or an offense under Chapter 481, Health and Safety Code (Texas Controlled Substances Act), or under the law of any other jurisdiction involving a controlled substance as defined by Chapter 481, Health and Safety Code, unless the person has met the other applicable eligibility requirements under this subchapter and has:

3. Received a certificate of discharge by the Texas Department of Criminal Justice or a correctional facility or completed a period of probation ordered by a court, and at least two years have elapsed from the date of the receipt or completion; **or**
4. The student has been pardoned or the record of the offense has been expunged from the student’s record and therefore the student has been released from the resulting ineligibility to receive a TEOG award.

Institutions are required to collect a statement (electronic or paper) from each TEOG recipient prior to the disbursement of funds confirming eligibility in regard to the controlled substance restrictions of the program. This statement must be retained with the student’s records at the institution and be made available if requested in the course of a program review or audit. Each statement collected must be retained with the student’s records for 7 years after the date of completion for the applicable award period (See [TAC, Section 22.4\(a\)\(2\)\(A\)](#)).

As long as a statement can be produced to prove a recipient’s eligibility for a given award period, the institution has the flexibility to determine the wording of the statement and the frequency with which it is collected. The institution can require all TEOG recipients to complete the statement every year they receive a TEOG award. The institution can also choose to collect the statement at least once from each TEOG recipient at the institution and word the statement in such a way to indicate that by signing, the student agrees that it is his/her responsibility to inform the institution if his/her status changes in the future. By choosing the second option, the institution can limit the statement required each year to initial or incoming recipients at the institution.

A **sample** statement is being provided:

Statement of Student Eligibility

Have you ever been convicted of a felony or an offense under Chapter 481, Health and Safety Code (Texas Controlled Substances Act), or under the law of another jurisdiction involving a controlled substance as defined by Chapter 481, Health and Safety Code?

_____ Yes* _____ No**

* If your answer is yes, contact the financial aid office to determine your eligibility to receive a TEOG.
** If your answer is no, it is your responsibility to inform the financial aid office if this status changes at any time while attending the institution.

I hereby certify that the information I have provided in this statement is true and correct. I understand that if I fail to provide accurate information, I may be required to reimburse the institution and penalties may be imposed. I also understand that it is my responsibility to inform the financial aid office if my status concerning this statement of eligibility changes at any time while attending this institution.

Student Signature

Date

DISCONTINUATION OF ELIGIBILITY ([19 TAC, SECTION 22.256](#))

Unless an extension of eligibility (due to a hardship circumstance) is granted, a student’s eligibility ends if any of the following maximums have been met, or the student earns an associate degree, whichever comes first.

TIME LIMIT	ATTEMPTED HOURS**	HOURS WHILE RECEIVING GRANT FUNDS
4 years from the first semester awarded	75 SCH	75 SCH (no hardship allowed)

**Attempted hours is defined as every course in every semester for which a student has been registered as of the official census date. This includes, but is not limited to repeated courses, courses the student drops or those that the student withdraws from. For transfer students, the transfer hours and hours for optional internship and cooperative education courses are included if they are accepted by the receiving institution towards the student's current program of study (See [19 TAC, Section 22.254](#)).

HARDSHIP PROVISIONS ([19 TAC, SECTION 22.257](#))

A student who is ineligible for a TEOG award based on grade point average (GPA), completion rate, or number of completed hours for satisfactory academic progress may be deemed eligible under the hardship provision. Each institution must adopt a hardship policy and have the policy available for public review. All hardship decisions must be documented in the student’s record and be available for submission to the THECB, if requested.



STOP: MAXIMUM HOURS OF ELIGIBILITY

While a hardship exception may be granted to allow an award in excess of 75 attempted semester credit hours (SCH), the total number of hours paid for with TEOG funds cannot exceed 75 SCH.

SATISFACTORY ACADEMIC PROGRESS (SAP) (19 TAC, SECTION 22.256)

At the end of the first academic year, a student must meet the SAP requirements set by the institution to be eligible for a first RY award.

At the end of the second academic year, and all subsequent years, a student must have completed 75% of total attempted hours and have a minimum 2.5 cumulative GPA.

The chart below reflects these requirements, which must be monitored to ensure compliance.

ACADEMIC YEAR	SAP REQUIREMENTS	
END OF 1ST ACADEMIC YEAR	Institutional SAP policy	
END OF 2ND ACADEMIC YEAR AND ALL SUBSEQUENT YEARS	Complete 75% of attempted SCH	2.5 cumulative GPA on a 4-point scale

AWARDING

! ALERT NEW: ELIMINATION OF REALLOCATION PROCESS

Beginning in the 2018-19 award year, institutions will now have until the close of business on **August 1** (or the first working day thereafter if it falls on a weekend or holiday) to request program funds. The prior process in February will no longer be used to reallocate grant funding.

Each biennium*, funds not requested in the first year can be rolled-over for use in the second. However, funds for the second year of the biennium cannot be requested in advance during the first. Any funds not requested in the second year of the biennium become available for grant processing determined by the THECB.

**A biennium is defined as a two-year period designated to spend appropriated funds by the Legislature to be allocated to the institutions.*

If allocated funds are insufficient to allow awards to all eligible students, first priority must be given to students that are eligible for an RY award (See [19 TAC, Section 22.258](#)).

In determining who should receive an IY TEOG award, an institution must give highest priority to students who demonstrate the greatest financial need at the time the award is made (See [19 TAC, Section 22.259](#)).

ADDITIONAL INFORMATION

GPA APPEALS

A student who does not meet the GPA requirement at the end of a spring term may appeal to have courses taken at other institutions included in the GPA calculation. In this case, all grade points previously earned must be included in the overall GPA calculation.

FIRST YEAR APPEALS

If a student completes the first year on academic warning, probation, or on an approved plan, the student can be considered meeting SAP, if the institution's policy includes such provisions. However, at the end of the second year, the student must meet the program SAP requirements for continued eligibility.

TEOG 2018-19 AWARD MAXIMUMS					
INSTITUTION TYPE	AWARD MAXIMUM PER YEAR	AWARD MAXIMUM BASED ON ENROLLMENT ON CENSUS DATE			
		FULL-TIME	3/4 TIME	1/2 TIME	< 1/2 TIME
PUBLIC STATE COLLEGES	\$5,862	\$2,931	\$2,199	\$1,466	\$0
PUBLIC TECHNICAL INSTITUTES	\$5,590	\$2,795	\$2,097	\$1,398	\$0
PUBLIC COMMUNITY COLLEGES	\$3,150	\$1,575	\$1,181	\$788	\$0

REQUIRED MATCHING ([19 TAC, SECTION 22.260](#))

Institutions are required to cover the cost of tuition and required fees that exceed the TEOG award amount using other available sources of financial aid, which may include any non-loan program funds awarded to the student from federal, state, institutional, or outside sources, excluding Pell grants. Funds used for this purpose are frequently referred to as “matching funds”. A **Required Fee**, for the purpose of administering the TEOG Program, includes mandatory fees (required by statute) or discretionary fees (authorized by statute, imposed by the governing board of an institution) and fees that an institution charges to a student as a condition of enrollment at the institution or in a specific course.

⚠️ ALERT: Institutions are required to match funds for all TEOG recipients, regardless if the student is in-district or out-of-district tuition and fees.

OVER AWARDS ([19 TAC, SECTION 22.260](#))

If an award has been disbursed and a student receives other assistance that exceeds the student’s financial need, the institution is not required to adjust the award unless the sum of the excess resources is greater than \$300.

LATE DISBURSEMENTS ([19 TAC, SECTION 22.261](#))

Funds that are disbursed after the end of a student’s period of enrollment must be used either to pay the student’s outstanding balance for the period of enrollment, or to make a payment on an outstanding loan received during that period of enrollment. Under no circumstances should funds be released directly to the student in this situation.

PRORATION

All TEOG award amounts must be prorated in relation to the student’s enrollment status as of the census date of a regular semester. (See [19 TAC, Section 22.260](#))

Award amounts must also be prorated in one of the following situations:

- Student is enrolled less than half-time with an extension of eligibility (due to a hardship circumstance).

HARDSHIP PRORATION SCHEDULE	ENROLLED < 6 HOURS

- The balance of eligible hours is less than the number of hours taken in the given term or semester:

BALANCE OF TOTAL ATTEMPTED HOURS	Balance = 9-11 hours: 75% of max award Balance = 6-8 hours: 50% of the max award
BALANCE OF ELIGIBLE PROGRAM HOURS	Balance = 1-5 hours: 25% of the max award

PROCESSING FUNDS

REQUESTING PROGRAM FUNDS

When requesting funds, institutions must submit a [Funds Request Form \(FRF\)](#). This form is available through the secure Coordinating Board Pass System (CBPASS) portal on the Student Financial Aid Programs Information Webpage.

RETURNING PROGRAM FUNDS

A [Return of Funds Form \(RFF\)](#) must be submitted and approved before any funds are returned to the THECB. This form is available on the Student Financial Aid Programs Information Webpage under **Online Resources**.



STOP: TIMELY DISTRIBUTION OF FUNDS ([19 TAC, Section 22.2](#))

- Institutions have 3 business days after receiving the funds to apply the funds to a student’s account
- Institutions have 6 business days after receiving the funds to return undisbursed funds
- Institutions have 45 calendar days from the date a student becomes ineligible to return disbursed funds
- Institutions have 120 calendar days to return funds after a student has notified the institution of a decision to cancel the award

ADDITIONAL INFORMATION

PRORATING AN AWARD

Listed below are 2 examples of how to calculate a prorated TEOG award.

Example One:

Student A is enrolled in 5 SCHs for the fall 2018 semester at ABC Community College and has an extension of eligibility due to an undue hardship circumstance. The prorated award should be calculated as:

- $\$1,575/12 = \131
- $\$131 \times 5 = \655

The prorated award for Student A = \$655


Example Two:

Student B is enrolled in 12 SCHs for the fall 2018 semester at XYZ State College but has only 8 SCHs of TEOG eligibility left. The prorated award should be calculated as:



- Maximum award for the semester = \$2,931
- $\$2,931 \times 50\% = \$1,465.50$

The prorated award for Student B = \$1,466

AUTHORITY TO TRANSFER FUNDS (19 TAC, SECTION 22.262)

 **STOP:** Institutions participating in TEOG and Texas College Work-Study (TCWS) may transfer up to 10% of the institution’s total annual program allocation or \$20,000 (whichever is less) between programs within the relevant fiscal year. Institutions requesting a transfer between programs must submit an [Authority to Transfer Form](#) by **January 18**.

If the institution transfers TEOG funds to TCWS, the transferred TCWS funds must be encumbered by **February 20**. If funds are being transferred from TCWS to TEOG, the institutions must first return the TCWS funds to the THECB by **January 18** but will have until **August 1** to request the transferred funds.

FROM	TO	Deadline to Encumber
TEXAS Grant TEOG TEG	 TCWS	FEBRUARY 20
OR		
TCWS	 TEXAS Grant TEOG TEG	AUGUST 1
Funds can only be transferred from a grant to TCWS or vice versa, never from a grant to a grant.		



TUITION EQUALIZATION GRANT PROGRAM

The Texas Higher Education Coordinating Board (THECB) Program Guidelines are intended to support institutions by highlighting requirements that appear in the Texas Education Code (TEC) and Title 19 of the Texas Administrative Code (TAC). When administering this program, institutions should always refer to the applicable statutes and rules. The information provided in this document is to be used solely as a resource and does not supersede the statute and/or rules for this program.

PROGRAM AUTHORITY AND PURPOSE ([19 TAC, SECTION 22.21](#))

The Tuition Equalization Grant (TEG) program was authorized by [TEC 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](#). The program is funded by appropriations by the Texas Legislature. The purpose of the TEG program is to promote the best use of existing educational resources and facilities within this state, both public and private, by providing need-based grants to Texas residents enrolled in approved private or independent Texas colleges or universities.

STATE PRIORITY DEADLINE ([TEC, SECTION 56.008 AND 19 TAC, SECTION 22.6](#) – Formerly: 19 TAC, 21.10)

The THECB provides a uniform priority deadline for applications that qualify for financial assistance in an academic year. Institutions eligible to participate in the TEG program are *encouraged* to publicize and use the **March 15** state priority deadline for identifying eligible students to be given priority in receiving awards through the state financial aid programs. Institutions may define how their students must meet the priority deadline. Institutions are encouraged to adopt a policy and procedure to ensure students are awarded consistently for this program.

! ALERT NEW: Beginning with the 2019-20 academic year and all years thereafter, all General Academic Teaching Institutions (GATIs) in Texas **must** publicize and use **January 15** as the state priority deadline. All other public and private/independent institutions are *encouraged* to use this deadline.

NOTE: The 2019-20 Free Application for Federal Student Aid (FAFSA) and Texas Application for State Financial Aid (TASFA) will use **January 15, 2019** as the state priority deadline date.

ELIGIBLE INSTITUTIONS ([19 TAC, SECTION 22.23](#))

Any college, university or branch campus, defined as a private or independent institution of higher education, is eligible to participate in the TEG program (See [TEC, Section 61.003](#)).

Each participating institution will have a single allocation in which initial year (IY), also known as first awards, and renewal year (RY), also known as subsequent awards, can be made.

ELIGIBILITY

ELIGIBILITY REQUIREMENTS ([19 TAC, SECTION 22.24](#))

TO RECEIVE A FIRST AWARD, A STUDENT MUST:

- ✓ Be classified by the institution as a Texas resident
- ✓ Be registered with Selective Service, or be exempt
- ✓ Have financial need
- ✓ Be enrolled at least 3/4 time
- ✓ Be an undergraduate **or** graduate student enrolled in degree plan leading to a **first** associate, baccalaureate, master's, professional, or doctoral degree (excluding degree plans that are intended to lead to religious ministry)
- ✓ Maintain satisfactory academic progress in his/her program of study as determined by the institution
- ✓ Not have earned a degree for which they are currently enrolled
- ✓ Not be a recipient of an athletic scholarship (i.e. the student is obliged to play an intercollegiate sport as a result of receiving the scholarship) during the semester(s) TEG is awarded
- ✓ Be required to pay more tuition than is required at a comparable public college or university and be charged no less than the tuition required of all similarly situated enrolled at the institution

TO RECEIVE A CONTINUATION AWARD, A STUDENT MUST:

- ✓ Meet all the first award requirements
- ✓ Maintain satisfactory academic progress



STOP: Non-resident National Merit Scholarship finalists are no longer eligible for a TEG award and there is no grandfathering provision included in this change.

SELECTIVE SERVICE STATEMENT (19 TAC, SECTION 22.3)

! ALERT NEW: STUDENT COMPLIANCE WITH SELECTIVE SERVICE

A male student cannot receive a grant, scholarship, loan or other financial assistance funded by state revenue, unless a statement of the individual's selective service status is completed with the institution or other entity granting or guaranteeing the financial assistance. This requirement also includes federal funds or gifts and grants accepted by this state and any loans guaranteed by the state of Texas (See [TEC, 51.9095](#)).

Typically, a student's selective service status is confirmed through the online FAFSA process which validates registration directly with the Selective Service Administration. If a student's selective service status is confirmed on the Institutional Student Information Record (ISIR), no statement needs to be collected by the institution.

The statement below **must** be collected for all male applicants, each academic year, in the following situations:

- A FAFSA that that is flagged "not registered" must be reviewed by the institution to determine if the student is exempt and may be eligible for federal or state financial aid programs. If the student is **exempt**, additional documentation should be collected by the institution to verify the circumstances. The institution can determine what additional documentation to collect for this verification.
- For a student that does not complete a FAFSA, the required statement and back-up documentation must be collected by the institution to verify the current selective service status if the individual is applying for any state financial aid.

NOTE: The institution has discretion to determine how to collect this required statement, which can be done electronically or on paper (e.g. online form, signed award letter, etc.). The statement and all documentation must be retained in the student's record and be made available if requested during a program review or audit. Each statement collected must be retained with the student's records for 7 years after the date of completion for the applicable award period (See [TAC, Section 22.4\(a\)\(2\)\(A\)](#)).

Required Statement of Selective Service Status

Are you currently registered for Selective Service, as required by federal law?

Registered

(Proof of registration required)

Not Registered

Exempt

(Documentation required)

I, _____, hereby certify that the selective service status provided is true and correct. I understand that I must provide documentation if requested by my institution that I may be required to complete a new statement for each academic year for continued eligibility.

Student Signature

Date

DISCONTINUATION OF ELIGIBILITY (19 TAC, SECTION 22.24)

An award cannot be granted to a student pursuing a second degree of one already earned. Unless an extension of eligibility (due to a hardship circumstance) is granted, a student’s eligibility ends if any of the following maximums have been met:

DEGREE TYPE	IF ENROLLED IN A DEGREE OR CERTIFICATE PROGRAM OF 4 YEARS OR LESS	IF ENROLLED IN A DEGREE OR CERTIFICATE PROGRAM OF MORE THAN 4 YEARS
RECIPIENT WORKING TOWARD AN ASSOCIATE OR BACCALAUREATE DEGREE	5 years from the first semester awarded	6 years from the first semester awarded
RECIPIENT WORKING TOWARD A MASTER'S, PROFESSIONAL, OR DOCTORAL DEGREE	No maximum time limit	

HARDSHIP PROVISIONS (19 TAC, SECTION 22.24)

A student who is ineligible for a TEG award based on grade point average (GPA), completion rate, or number of completed hours for satisfactory academic progress may be deemed eligible under a hardship provision. Each institution must adopt a hardship policy and have the policy available for public review. All hardship decisions must be documented in the student’s record and be available for submission to the THECB, if requested.

SATISFACTORY ACADEMIC PROGRESS (SAP) (19 TAC, SECTION 22.24)

At the end of the first academic year, a student must meet the SAP requirements set by the institution to be eligible for a continuation award.

At the end of the second academic year, and all years thereafter, undergraduates must have completed 24 semester credit hours (SCH) in the most recent academic year, with a 75% completion rate for hours attempted in that year, and must have a minimum 2.5 cumulative GPA. Graduate students must have completed 18 SCH in the most recent academic year, with a 75% completion rate for hours attempted in that year, and must have a minimum 2.5 cumulative GPA.

The chart below reflects requirements, which must be monitored to ensure compliance.

ACADEMIC YEAR	SAP REQUIREMENTS		
END OF 1ST ACADEMIC YEAR	Institutional SAP policy		
END OF 2ND ACADEMIC YEAR OR LATER – UNDERGRADUATE STUDENTS	Completion of at least 24 SCH in the most recent academic year	75% completion rate	2.5 cumulative GPA on a 4-point scale or its equivalent for all coursework attempted at a public, private, or independent institution
END OF 2ND ACADEMIC YEAR OR LATER – GRADUATE STUDENTS	Completion of at least 18 SCH in the most recent academic year		

ADDITIONAL INFORMATION

GPA APPEALS

A student who does not meet the GPA requirement at the end of a spring term may appeal to have courses taken at other institutions included in the GPA calculation. In this case, all grade points previously earned must be included in the overall GPA calculation.

FIRST YEAR APPEALS

If a student who completes the first year on academic warning, probation, or on an approved plan, the student can be considered meeting SAP, if the institution’s policy includes such provisions. However, at the end of the second year, the student must meet the program SAP requirements for continued eligibility.

FAILING COURSES

The intent of the 24/18 SCH requirement is to encourage timely progression towards a degree. Since a grade of **F** is not earned toward a degree, it should not be considered when calculating the student’s completed hours. Failing grades must be considered attempted hours, and therefore counted in the calculation of a student’s completion rate.

AWARDING

! ALERT NEW: ELIMINATION OF REALLOCATION PROCESS

Beginning in the 2018-19 award year, institutions will now have until the close of business on **August 1** (or the first working day thereafter if it falls on a weekend or holiday) to request program funds. The prior process in February will no longer be used to reallocate grant funding.

Each biennium*, funds not requested in the first year can be rolled-over for use in the second. However, funds for the second year of the biennium cannot be requested in advance during the first. Any funds not requested in the second year of the biennium become available for grant processing determined by the THECB.

**A biennium is defined as a two-year period designated to spend appropriated funds by the Legislature to be allocated to the institutions.*

Institutions have until August 1 to encumber the program funds that have been allocated. In determining who should receive a TEG award, an award may not exceed a student's financial need or tuition differential for that term or semester.

Undergraduate students with exceptional financial need may receive up to 150% of the program maximum award (see [19 TAC, SECTION 22.26](#)). Exceptional financial need is defined as the amount of unmet need a student has if his or her expected family contribution (EFC) is less than or equal to \$1,000.

TEG 2018-19 AWARD MAXIMUMS		
INSTITUTION TYPE	AWARD MAX/YEAR	EXCEPTIONAL NEED
PRIVATE/INDEPENDENT INSTITUTIONS	\$3,364	\$5,046
Undergraduate students whose EFC's are ≤ \$1,000 may receive up to the Exceptional Need award amount.		

TUITION DIFFERENTIAL (19 TAC, SECTION 22.22)

Tuition differential is defined as the difference between the tuition paid at a private or independent institution and the tuition the student would have to pay to attend a comparable public institution in Texas. Fees are not included in this calculation, only tuition rates.

The Southern Association of Colleges and Schools (SACS) identifies institutions by the highest levels of degrees they offer. These levels are being used by the THECB to identify “comparable” institutions for the purpose of calculating tuition differentials. The following table shows average resident undergraduate and graduate tuition rates per SCH for public institutions at various SACS levels for the 2018-19 academic year.

These amounts should be used by the institution to derive tuition differentials by using the student’s total SCH and multiplying the tuition rate provided (see **Appendix 1** for individual institutional program levels).

SACS LEVEL	UNDERGRADUATE TUITION RATE PER SCH	GRADUATE TUITION RATE PER SCH
ASSOCIATE DEGREE LEVEL 1	\$61	n/a
BACCALAUREATE DEGREE LEVEL 2	\$60	n/a
MASTER’S DEGREE LEVEL 3	\$190	\$273
THREE OR FEWER DOCTORAL DEGREES LEVEL 5	\$196	\$260
FOUR OR MORE DOCTORAL DEGREES LEVEL 6	\$245	\$316
PUBLIC INSTITUTION RATES FOR LAW SCHOOL STUDENTS = \$880 PER SCH		

OVER AWARDS (19 TAC, SECTION 22.26)

If an award has been disbursed and a student receives other assistance that exceeds the student's financial need, the institution is not required to adjust the award unless the sum of the excess resources is greater than \$300.

LATE DISBURSEMENTS (19 TAC, SECTION 22.28)

Funds that are disbursed after the end of a student’s period of enrollment must be used either to pay the student’s outstanding balance for the period of enrollment, or to make a payment on an outstanding loan received during that period of enrollment. Under no circumstances should funds be released directly to the student in this situation.

ADDITIONAL INFORMATION

TUITION DIFFERENTIAL EXAMPLES:

- Charges for an independent 2-year institution (e.g. Jacksonville College) should be compared to public community college charges (Level 1).
- A Level 2 institution that only awards TEG to associate degree students (e.g. Southwestern Christian College) should compare its charges to those of public community colleges (Level 1).
- Levels 2, 3, 5 and 6 independent institutions (other than Southwestern Christian College) should compare their charges to the average charges of public institutions at the same levels.

PRORATION (19 TAC, SECTION 22.26)

Awards must be prorated if the student has been approved for an exception to the 3/4 time enrollment requirement due to a hardship circumstance:

UNDERGRADUATE HARDSHIP PRORATION SCHEDULE	ENROLLED 6-8 HOURS	ENROLLED < 6 HOURS
	50% of the maximum award amount	25% of the maximum award amount
GRADUATE HARDSHIP PRORATION SCHEDULE	ENROLLED 5-6 HOURS	ENROLLED < 5 HOURS
	50% of the maximum award amount	25% of the maximum award amount

ADJUSTMENTS TO AWARDS (19 TAC, SECTION 22.27)

If a student officially withdraws or the amount of a student's disbursement exceeds the amount the student is eligible to receive, the institution must follow its institutional refund policy in determining the amount by which the award must be reduced.

- These funds should be re-awarded to other eligible students attending the institution. If funds cannot be re-awarded, they should be returned to the THECB no later than the end of the state fiscal year for which they were allocated to the institution.
- If the student withdraws or drops classes after the end of the institution's refund period, no refunds to the program are due.

PROCESSING FUNDS

REQUESTING PROGRAM FUNDS

When requesting funds, institutions must submit a [Funds Request Form \(FRF\)](#). This form is available through the secure Coordinating Board Pass System (CBPASS) portal on the Student Financial Aid Programs Information Webpage.

RETURNING PROGRAM FUNDS


A [Return of Funds Form \(RFF\)](#) must be submitted and approved before any funds are returned to the THECB. This form is available on the Student Financial Aid Programs Information Webpage under **Online Resources**.





STOP: TIMELY DISTRIBUTION OF FUNDS (19 TAC, Section 22.2)

- Institutions have 3 business days after receiving the funds to apply the funds to a student's account
- Institutions have 6 business days after receiving the funds to return undisbursed funds
- Institutions have 45 calendar days from the date a student becomes ineligible to return disbursed funds
- Institutions have 120 calendar days to return funds after a student has notified the institution of a decision to cancel the award

AUTHORITY TO TRANSFER FUNDS (TAC, SECTION 22.30)

 **STOP:** Institutions participating in TEG and Texas College Work-Study (TCWS) may transfer up to 10% of the institution’s total annual program allocation or \$20,000 (whichever is less) between programs within the relevant fiscal year. Institutions requesting a transfer between programs must submit an [Authority to Transfer Form](#) by **January 18**.

If the institution transfers TEG funds to TCWS, the transferred TCWS funds must be encumbered by **February 20**. If funds are being transferred from TCWS to TEG, the institutions must first return the TCWS funds to the THECB by **January 18** but will have until **August 1** to request the transferred funds.

FROM		TO	Deadline to Encumber
TEXAS Grant TEOG TEG		TCWS	FEBRUARY 20
OR			
TCWS		TEXAS Grant TEOG TEG	AUGUST 1

Funds can only be transferred from a grant to TCWS or vice versa, never from a grant to a grant.



TOP TEN PERCENT SCHOLARSHIP PROGRAM

The Texas Higher Education Coordinating Board (THECB) Program Guidelines are intended to support institutions by highlighting requirements that appear in the Texas Education Code (TEC) and Title 19 of the Texas Administrative Code (TAC). When administering this program, institutions should always refer to the applicable statutes and rules. The information provided in this document is to be used solely as a resource and does not supersede the statute and/or rules for this program.

PROGRAM AUTHORITY AND PURPOSE ([19 TAC, SECTION 22.196](#))

The Top Ten Percent (Top 10%) Scholarship program was originally authorized by the 80th Texas Legislature to encourage outstanding high school students who graduate within the top 10 percent of their high school graduating class to attend a public college or university in Texas. The General Appropriations Act passed by the 85th Texas Legislature (Article III, p. 45 and Rider 27) authorizes renewal awards for state Fiscal Year 2019. Rules establishing procedures to administer the program can be found in [Title 19 of the TAC, Chapter 22, Subchapter K](#). The program is funded through state General Revenue appropriations.

STATE PRIORITY DEADLINE ([TEC, SECTION 56.008 AND 19 TAC, SECTION 22.6](#) – Formerly: 19 TAC, 21.10)

The THECB provides a uniform priority deadline for applications that qualify for financial assistance in an academic year. General Academic Teaching Institutions (GATIs) in Texas **must** publicize and use **March 15** as the state priority deadline for identifying eligible students to be given priority in receiving awards through the state financial aid programs. All other public institutions are encouraged to use this state priority deadline. Institutions may define how their students must meet the priority deadline. Institutions are encouraged to adopt a policy and procedure to ensure consistency in making awards through this program.

! ALERT NEW: Beginning with the 2019-20 academic year and all years thereafter, all General Academic Teaching Institutions (GATIs) in Texas **must** publicize and use **January 15** as the state priority deadline. All other public and private/independent institutions are *encouraged* to use this deadline.


NOTE: The 2019-20 Free Application for Federal Student Aid (FAFSA) and Texas Application for State Financial Aid (TASFA) will use **January 15, 2019** as the state priority deadline date.

ELIGIBLE INSTITUTIONS ([19 TAC, SECTION 22.198](#))

All public institutions of higher education, as defined in [TEC, Section 61.003](#), are eligible to make renewal awards only under the Top 10% Scholarship program.

ELIGIBILITY

ELIGIBILITY REQUIREMENTS ([19 TAC, SECTION 22.199](#))

 **STOP:** Beginning with the 2015-16 academic year, renewal awards **only** are authorized for the Top 10% Scholarship Program.

TO RECEIVE A RENEWAL YEAR AWARD, A STUDENT MUST:

- ✓ Be an undergraduate baccalaureate student who previously received an award
- ✓ Be classified by the institution as a Texas resident
- ✓ Be registered with Selective Service, or be exempt
- ✓ Complete the Free Application for Federal Student Aid (FAFSA) or the Texas Application for State Financial Aid (TASFA)
- ✓ Have unmet financial need, as determined by the following formula:
 - cost of attendance (COA) minus the expected family contribution (EFC), minus Pell grant eligibility (remainder must be greater than zero)
- ✓ Be enrolled full-time (at least 12 semester credit hours) as of the census date
- ✓ Maintain program satisfactory academic progress requirements

DISCONTINUATION OF ELIGIBILITY ([19 TAC, SECTION 22.201](#))

Unless an extension of eligibility (due to a hardship circumstance) is granted, a student's eligibility ends if any of the following maximums have been met:

TIME LIMIT	DEGREE OBTAINED	NUMBER OF AWARDS
4 Consecutive Years	Baccalaureate (No hardship allowed)	4 Awards (No hardship allowed)

HARDSHIP PROVISIONS ([19 TAC, SECTION 22.201](#))

A student who is ineligible based on the requirements for the GPA, completion rate, and/or number of completed hours for satisfactory academic progress, may be deemed eligible under a hardship provision. Participating institutions must adopt a hardship policy and have the policy available for public review upon request. All hardship decisions must be documented in the student's record and be available for submission to the THECB, if requested.

SATISFACTORY ACADEMIC PROGRESS (SAP) ([19 TAC, SECTION 22.201](#))

A student's SAP eligibility is determined at the end of each academic year. Students must complete 30 semester credit hours (SCH), have a completion rate of 75%, and maintain a 3.25 cumulative GPA on a 4-point scale.

END OF EACH ACADEMIC YEAR	SAP REQUIREMENTS		
	30 SCH in an academic year	75% completion rate in an academic year	3.25 cumulative GPA on a 4-point scale

ADDITIONAL INFORMATION

CALCULATE AN AWARD

Top 10% Scholarship recipients can receive the maximum award amount even if the amount exceeds the calculated need. An applicant is determined eligible if the following is true:

$$\text{Need} = \text{COA} - \text{EFC} - \text{Pell} > \$0$$

$$\text{Ex: } \$20,000 - \$19,999 - 0 = \$1$$

In this example, although the recipient has only \$1 of need, the student is eligible to receive up to the maximum award amount.

EXTENSION OF ELIGIBILITY

An extension of eligibility can be issued beyond 4 consecutive years with an approved hardship, as long as the student has not received more than 4 awards.

FOR EXAMPLE:

A student received an initial award in fall 2013 and did not attend college again until fall 2018. Since the student only received one award, the student may be eligible for an award with an extension of eligibility due to an undue hardship, if all other eligibility requirements are met.

SELECTIVE SERVICE STATEMENT ([19 TAC, SECTION 22.3](#))

! ALERT NEW: STUDENT COMPLIANCE WITH SELECTIVE SERVICE

A male student cannot receive a grant, scholarship, loan or other financial assistance funded by state revenue, unless a statement of the individual's selective service status is completed with the institution or other entity granting or guaranteeing the financial assistance. This requirement also includes federal funds or gifts and grants accepted by this state and any loans guaranteed by the state of Texas (See [TEC, 51.9095](#)).

Typically, a student's selective service status is confirmed through the online FAFSA process which validates registration directly with the Selective Service Administration. If a student's selective service status is confirmed on the Institutional Student Information Record (ISIR), no statement needs to be collected by the institution.

The statement below **must** be collected for all male applicants, each academic year, in the following situations:

- A FAFSA that that is flagged "not registered" must be reviewed by the institution to determine if the student is exempt and may be eligible for federal or state financial aid programs. If the student is **exempt**, additional documentation should be collected by the institution to verify the circumstances. The institution can determine what additional documentation to collect for this verification.
- For a student that does not complete a FAFSA, the required statement and back-up documentation must be collected by the institution to verify the current selective service status if the individual is applying for any state financial aid.

NOTE: The institution has discretion to determine how to collect this required statement, which can be done electronically or on paper (e.g. online form, signed award letter, etc.). The statement and all documentation must be retained in the student's record and be made available if requested during a program review or audit. Each statement collected must be retained with the student's records for 7 years after the date of completion for the applicable award period (See [TAC, Section 22.4\(a\)\(2\)\(A\)](#)).

Required Statement of Selective Service Status

Are you currently registered for Selective Service, as required by federal law?

Registered (Proof of registration required)
 Not Registered
 Exempt (Documentation required)

I, _____, hereby certify that the selective service status provided is true and correct. I understand that I must provide documentation if requested by my institution that I may be required to complete a new statement for each academic year for continued eligibility.

Student Signature _____
Date

AWARDING

In determining eligibility, renewal recipients must be classified as a **Priority 1** or **Priority 2** applicant.
(See [19 TAC, Section 22.200](#))

Recipients are classified as **Priority 1** if the following was completed by the March 15, 2018 state priority deadline:

- FAFSA was submitted in time to generate the Central Processing System (CPS) results in a non-rejected status
- TASFA was submitted to the financial aid office

All other eligible recipients are classified as **Priority 2**.

TOP 10% SCHOLARSHIP 2018-19 AWARD MAXIMUMS

INSTITUTION TYPE	AWARD TYPE	AWARD MAX/YEAR
PUBLIC INSTITUTIONS	Priority 1	\$2,000
	Priority 2	\$2,000


Both **Priority 1** and **Priority 2** recipients must be included in the Top 10% Scholarship Funds Requests File. While only **Priority 1** recipients can initially receive funds, **Priority 2** recipients will be reviewed and processed if funding is available.

PROCESSING FUNDS

REQUESTING PROGRAM FUNDS ([19 TAC, SECTION 22.202](#))

Funds for Top 10% Scholarship students will not be disbursed until the institution submits a file through the secure file transfer portal called [MOVEit DMZ](#).

The Top 10% Scholarship Funds Requests File Instructions are available on the [Student Financial Aid Programs Information Webpage](#). Files can be submitted to THECB no later than October 1, 2018. Information included in the file will be used by THECB to confirm and approve funding for eligible students.

 **STOP:** If funds are disbursed for a student who is later determined to be ineligible, the award must be returned to the THECB. Top 10% Scholarship funds are issued on a student-by-student basis and cannot be transferred to another eligible student.

RETURNING PROGRAM FUNDS

A [Return of Funds Form \(RFF\)](#) must be submitted and approved before any funds are returned to the THECB. This form is available on the Student Financial Aid Programs Information Webpage under **Online Resources**.

STOP: TIMELY DISTRIBUTION OF FUNDS ([19 TAC, Section 22.2](#))

- Institutions have 3 business days after receiving the funds to apply the funds to a student's account
- Institutions have 6 business days after receiving the funds to return undisbursed funds
- Institutions have 45 calendar days from the date a student becomes ineligible to return disbursed funds
- Institutions have 120 calendar days to return funds after a student has notified the institution of a decision to cancel the award



TEXAS ARMED SERVICES SCHOLARSHIP PROGRAM

The Texas Higher Education Coordinating Board (THECB) Program Guidelines are intended to support institutions by highlighting requirements that appear in the Texas Education Code (TEC) and Title 19 of the Texas Administrative Code (TAC). When administering this program, institutions should always refer to the applicable statutes and rules. The information provided in this document is to be used solely as a resource and does not supersede the statute and/or rules for this program.

PROGRAM AUTHORITY AND PURPOSE [\(19 TAC, SECTION 22.163\)](#)

The Texas Armed Services Scholarship Program (TASSP) is authorized by [TEC, Chapter 61, Subchapter A, Section 61.9771](#). Rules establishing procedures to administer the subchapter can be found in [Title 19 of the TAC, Chapter 22, Subchapter I](#). The purpose of the TASSP is to encourage students to become members of the Texas Army National Guard, Texas Air National Guard, Texas State Guard, United States Coast Guard or United States Merchant Marine, or to become commissioned officers in any branch of the armed services of the United States.

ELIGIBLE INSTITUTIONS [\(19 TAC, SECTION 22.164\)](#)

Public institutions of higher education, as defined in [TEC, Section 61.003](#), and private or independent institutions of higher education, as defined in [TEC, Section 61.003\(15\)](#), can participate.

ELIGIBILITY

REQUIREMENTS FOR APPOINTMENTS ([19 TAC, SECTION 22.166](#))

Each year, the governor and the lieutenant governor may each appoint two students, and each state senator and state representative may appoint one student to receive an initial TASSP award. A student must meet **two** of the following **four** criteria, by the deadline established by the THECB, to be appointed:

- Be on track to graduate or graduated high school with the Distinguished Achievement Program (DAP), or the International Baccalaureate (IB) Program
- Have a high school GPA of 3.0 or higher on a 4.0 scale
- Achieved a college readiness score on the SAT (1070) or ACT (23)
- Be ranked in the top one-third of the prospective high school graduating class

! ALERT NEW: If a student fails to meet the requirements to initially receive a TASSP award, the THECB will notify the legislative office of their nominee's change in eligibility so the legislator can submit an **alternate**. The governor, lieutenant governor, state senator, and state representative may select an alternate for each initial student nominee that becomes ineligible. The THECB will notify the alternate of his or her nomination (See [TAC, Section 22.166\(a\)](#)).

ELIGIBILITY REQUIREMENTS ([19 TAC, SECTION 22.167](#) AND [22.169](#))

TO RECEIVE AN INITIAL AWARD, A STUDENT MUST:

- ✓ Be appointed by the governor, lieutenant governor, state senator or state representative before the **August 31, 2018** deadline
- ✓ Be enrolled and in good standing in a Reserve Officers Training Corps (ROTC), or another undergraduate officer commissioning program, as certified by the institution
- ✓ Enter into a written agreement with the THECB to:
 - Complete four years of ROTC training, or its equivalent if the institution awards ROTC credit for prior service in any branch of the US Armed Services or the Texas Army National Guard, Texas Air National Guard, US Coast Guard, or US Merchant Marine, or another undergraduate officer commissioning program
 - Graduate no later than six years after the date first enrolled after receiving a high school diploma or General Educational Diploma (GED) or its equivalent
- ✓ No later than six months after graduation, enter into and provide the THECB with verification of:
 - A four-year commitment to be a member of the Texas Army National Guard, Texas Air National Guard, Texas State Guard, United States Coast Guard, or United States Merchant Marine; **OR**
 - Contract to serve as a commissioned officer in any branch of the armed services of the United States
- ✓ Meet the physical examination and all prescreening requirements of the entity with which the student enters into a contract
- ✓ Be registered with Selective Service, or be exempt (see [19 TAC, Section 22.3](#))

ADDITIONAL INFORMATION

STUDENT APPLICATION DEADLINE

Students must complete their TASSP online applications by October 15, 2018.

HOW CAN A STUDENT APPLY?

1. The student will need to be selected by the governor, lieutenant governor, a senator, or a state representative.

- Students can identify a legislator by visiting, [Who Represents Me](#).
- To contact the governor's office, a student can call (512) 463-1828 or visit, [Governor's Appointment Responsibility](#).
- To contact the lieutenant governor's office, a student can call (512) 463-0001.

2. Once selected, the student will receive a Notice of Selection letter.


3. Once the student is enrolled in an eligible institution and ROTC program, the Notice of Selection must be provided to the financial aid office.

4. The financial aid office will certify the student's program eligibility to the THECB.


5. Once the THECB receives the institution's eligibility certification, the student will receive an email notifying them to complete the TASSP application at [Loans Online](#).

TO RECEIVE A CONTINUATION AWARD, A STUDENT MUST:

- ✓ Maintain **program** satisfactory academic progress (SAP), as defined by the THECB (New section provided on page 4)
- ✓ Continue to be a member of the Reserve Officers' Training Corps (ROTC) or another undergraduate officer commissioning program
- ✓ Not have earned a baccalaureate degree or a cumulative total of 150 hours (includes transfer hours) as verified by the institution

 **STOP:** Effective **May 2018** (See [TAC, SECTION 22.170\(b\)](#)), if the student fails to meet any of the conditions for continued eligibility, the student:

- Cannot regain award eligibility in a subsequent academic year
- Loses eligibility to receive any future awards
- Loses eligibility to have his or her existing loans forgiven

 **ALERT NEW:** Effective **September 1, 2018**, if a recipient fails to maintain eligibility for a continuing award, beginning with the academic year following the determination, the appointing official may appoint a **replacement** student to receive any remaining eligibility for the student who no longer meets the requirements for the award (See [TAC, section 22.166\(f\)](#)).

SELECTIVE SERVICE STATEMENT ([19 TAC, SECTION 22.3](#))

 **ALERT NEW: STUDENT COMPLIANCE WITH SELECTIVE SERVICE**

A male student cannot receive a grant, scholarship, loan or other financial assistance funded by state revenue, unless a statement of the individual's selective service status is completed with the institution or other entity granting or guaranteeing the financial assistance. This requirement also includes federal funds or gifts and grants accepted by this state and any loans guaranteed by the state of Texas (See [TEC, 51.9095](#)).

Typically, a student's selective service status is confirmed through the online Free Application for Federal Student Aid (FAFSA) process which validates registration directly with the Selective Service Administration. If a student's selective service status is confirmed on the Institutional Student Information Record (ISIR), no statement needs to be collected by the institution.

The statement below **must** be collected for all male applicants, each academic year, in the following situations:

- A FAFSA that that is flagged "not registered" must be reviewed by the institution to determine if the student is exempt and may be eligible for federal or state financial aid programs. If the student is **exempt**, additional documentation should be collected by the institution to verify the circumstances. The institution can determine what additional documentation to collect for this verification.
- For a student that does not complete a FAFSA, the required statement and back-up documentation must be collected by the institution to verify the current selective service status if the individual is applying for any state financial aid.

NOTE: The institution has discretion to determine how to collect this required statement, which can be done electronically or on paper (e.g. online form, signed award letter, etc.). The statement and all documentation must be retained in the student's record and be made available if requested during a program review or audit. Each statement collected must be retained with the student's records for 7 years after the date of completion for the applicable award period (See [TAC, Section 22.4\(a\)\(2\)\(A\)](#)).

Required Statement of Selective Service Status

Are you currently registered for Selective Service, as required by federal law?

Registered (Proof of registration required)
 Not Registered
 Exempt (Documentation required)

I, _____, hereby certify that the selective service status provided is true and correct. I understand that I must provide documentation if requested by my institution that I may be required to complete a new statement for each academic year for continued eligibility.

Student Signature Date

CONVERSION OF THE SCHOLARSHIP TO A LOAN ([19 TAC, SECTION 22.170](#))

A TASSP award will be converted to a loan if the student **fails to**:

- Maintain satisfactory academic progress as required by the program, or by the institution’s ROTC or another undergraduate officer commissioning program;
- Fulfill the terms in the TASSP agreement, that include:
 - Complete four years of ROTC training, or its equivalent if the institution awards ROTC credit for prior service in any branch of the US Armed Services or the Texas Army National Guard, Texas Air National Guard, US Coast Guard, or US Merchant Marine, or another undergraduate officer commissioning program
 - Graduate no later than six years after the date first enrolled after receiving a high school diploma or General Educational Diploma (GED) or its equivalent; **OR**
- Fulfill one of the following:
 - Complete a four year commitment to be a member of the Texas Army National Guard, Texas Air National Guard, Texas State Guard, United States Coast Guard, or United States Merchant Marine; **OR**
 - Contract to serve as a commissioned officer in any branch of the armed services of the United States.

If a student requires a temporary leave of absence from the institution and/or the ROTC or another undergraduate officer commissioning program for personal reasons or to provide service for the Texas Army National Guard, Texas Air National Guard, Texas State Guard, United States Coast Guard, or United States Merchant Marine for fewer than twelve months, the THECB may agree to **not convert** the scholarship award to a loan during that time.

If a student is required to provide more than twelve months of service in the Texas Army National Guard, Texas Air National Guard, Texas State Guard, United States Coast Guard, or United States Merchant Marine as a result of a national emergency, the THECB can grant that student additional time to meet the graduation and service requirements specified in the TASSP agreement (See [19 TAC, Section 22.170](#)).

SATISFACTORY ACADEMIC PROGRESS (SAP) ([19 TAC, SECTION 22.169](#))

! ALERT NEW: At the end of every academic year, a student must have completed 24 semester credit hours (SCH) and have a minimum 2.5 cumulative grade point average (GPA).

The chart below reflects the program SAP requirements which must be monitored to ensure compliance:

ACADEMIC YEAR	SATISFACTORY ACADEMIC PROGRESS (SAP) REQUIREMENTS	
END OF EVERY ACADEMIC YEAR	24 SCH in the most recent academic year	2.5 cumulative GPA on a 4-point scale for all coursework attempted

NOTE: Maximum for the semester credit hours earned includes transfer hours, as verified by the institution.

AWARDING

The TASSP award maximum is determined and announced annually by the THECB and cannot exceed \$15,000 in an academic year. The award must be reduced by the amount of the combined total to be paid to the student for being under contract with one of the branches of the armed services and the full amount of the scholarship, if it exceeds the student’s total cost of attendance (COA) for that academic year. (See [19 TAC, Section 22.165](#)).

STOP: A student cannot receive a TASSP award for more than four of the six years that are allowed for a student to graduate.

TASSP 2018-19 AWARD AMOUNTS		
INSTITUTION TYPE	AWARD TYPE	AWARD MAX/YEAR
PUBLIC INSTITUTIONS	INITIAL/RENEWAL	\$4,000
PRIVATE INSTITUTIONS	INITIAL/RENEWAL	\$4,000

PROCESSING FUNDS

REQUESTING PROGRAM FUNDS

Funds will not be disbursed until the promissory note is signed by the borrower and the Financial Aid Administrator certifies the loan using one of the following two methods:

- Certify the loan through the [HelmNet](#) loan portal; **OR**
- Submit a **Commonline Loan Certification File** using the [MOVEit DMZ](#) secure file transfer portal.

RETURNING PROGRAM FUNDS

A [Return of Funds Form \(RFF\)](#) must be submitted and approved before any funds are returned to the THECB. This form is available on the Student Financial Aid Programs Information Webpage under **Online Resources**.



STOP: TIMELY DISTRIBUTION OF FUNDS ([19 TAC, SECTION 22.2](#))

- Institutions have 3 business days after receiving the funds to apply the funds to a student's account
- Institutions have 6 business days after receiving the funds to return undisbursed funds
- Institutions have 45 calendar days from the date a student becomes ineligible to return disbursed funds
- Institutions have 120 calendar days to return funds after a student has notified the institution of a decision to cancel the award

REPAYMENT

If the scholarship is converted to a loan, the student will have a 6-month grace period beginning on the date the student ceases to be enrolled at least half-time at an eligible institution. Repayment is scheduled to begin after the expiration of the 6-month grace period, although interest begins to accrue on the date the scholarship is converted to a loan. The TASSP loan has a 15-year repayment period and a minimum monthly payment of \$100, or an amount required to repay the loan within 15 years, whichever is greater. The interest rate charged on TASSP loans will be the same rate charged for a College Access Loan at the time the funds were disbursed. A charge of five percent of the scheduled monthly payment or five dollars, whichever is less, will be charged if a past due payment amount is not received within 20 days of the scheduled due date. (See [19 TAC, Section 22.171](#)).



STOP: Students experiencing a medical disability, or any type of financial hardship can apply for postponed or reduced payments and cancellation (medical disability only) of their TASSP loan.

To apply, a student must:

- Navigate to [HHloans.com](#) and select [Forms](#)
- Complete the appropriate form (ex: General Postponement Request Form, Texas Armed Services Scholarship Program Loan Discharge Form)
- Submit completed forms to:
 - Hinson-Hazlewood College Student Loan Program
P.O. Box 12788
Austin, TX 78711-2788
OR
 - Fax: (512) 427-6423



EDUCATIONAL AIDE EXEMPTION PROGRAM

The Texas Higher Education Coordinating Board (THECB) Program Guidelines are intended to support institutions by highlighting requirements that appear in the Texas Education Code (TEC) and Title 19 of the Texas Administrative Code (TAC). When administering this program, institutions should always refer to the applicable statutes and rules. The information provided in this document is to be used solely as a resource and does not supersede the statute and/or rules for this program.

PROGRAM AUTHORITY AND PURPOSE ([19 TAC, SECTION 21.1080](#))

The Educational Aide Exemption (EAE) program is authorized by [TEC, Chapter 54, Section 54.363 Subchapter A](#). Rules establishing procedures to administer the subchapter can be found in [Title 19 of the TAC, Chapter 21, Subchapter II](#). The purpose of the EAE program is to encourage certain Educational Aides to complete full teacher certification by providing need-based exemptions from the payment of tuition and certain mandatory fees at Texas public institutions of higher education.

ELIGIBLE INSTITUTIONS ([19 TAC, SECTION 21.1082](#))

All public institutions, as defined by [TEC, Section 61.003](#), are invited annually to participate in the EAE program allocation process. Those choosing not to participate will not be considered in the allocation calculation for the applicable year.

ELIGIBILITY

ELIGIBILITY REQUIREMENTS ([19 TAC, SECTION 21.1083](#))

TO RECEIVE AN INITIAL AWARD, A STUDENT MUST:

- ✓ Be classified by the institution as a Texas resident
- ✓ Be registered with Selective Service, or be exempt
- ✓ Have financial need
- ✓ Meet the institution's satisfactory academic progress requirements
- ✓ Have been employed by a public school district in Texas working in the classroom directly with the students on a full-time basis as:
 - An Educational Aide for at least one school year, during the five years preceding the term or semester for which the student received the initial award; **OR**
 - A substitute teacher, for 180 or more full days during the five years preceding the term or semester for which the student received the initial award
- ✓ Be employed in some capacity by a public school district in Texas during the full term for which the student receives the award
- ✓ Be enrolled in courses required for teacher certification in one or more subject areas experiencing a critical shortage of teachers at public schools in Texas, as determined by the Texas Education Agency (TEA)
 - Bilingual/English as a Second Language
 - Career and Technical Education
 - Mathematics
 - Special Education - Elementary and Secondary Levels

TO RECEIVE A CONTINUATION AWARD, A STUDENT MUST:

- ✓ Meet all initial award requirements
- ✓ Meet the institution's financial aid grade point average (GPA) requirement for making satisfactory academic progress towards a degree or certificate in accordance with the institution's policy
- ✓ If classified as an undergraduate, have not completed an excessive number of semester credit hours (SCH) as defined in [TEC, Section 54.014](#)

If the student received an EAE award prior to fall 2012:

- ✓ Meet all initial award requirements (**excluding** the critical shortage area obligation)
- ✓ Be enrolled in courses required for teacher certification or, if enrolled in lower-level coursework, sign a statement indicating an intention to become certified as a teacher in Texas

ADDITIONAL INFORMATION

GRADUATE STUDENT ELIGIBILITY

Students enrolled in graduate courses leading to a teacher certification in a teacher shortage area can be considered eligible for the EAE, if all other requirements are met.

APPLICANTS WITH A HIGH EFC

The EAE program does not have an EFC limitation or a maximum adjusted gross income (AGI) requirement. To qualify, applicants must have financial need as defined in [19 TAC, Section 21.1081 \(8\)](#). Eligible applicants who meet this criterion can be awarded the amount required to exempt the student from payment of resident tuition and fees for courses taken during the applicable term, even if the award amount exceeds the student's financial need.

SCHOOL DISTRICT EMPLOYEE ELIGIBILITY

Eligible applicants can be employed in any capacity at a Texas public school district (e.g. Bus Driver), providing the applicant has the required Educational Aide work experience. Awarded students must remain employed for the full term.



STOP: EXCESSIVE UNDERGRADUATE HOURS

The excessive hours calculation **excludes**:

- Hours earned exclusively by examination
- Hours earned for a course credit received toward the person's high school academic requirements
- Hours earned for developmental courses that the institution required the person to take under [TEC, Section 51.331](#)
- Hours described in [TEC, Section 61.0595\(d\)](#)

SELECTIVE SERVICE STATEMENT ([19 TAC, SECTION 22.3](#))

! ALERT NEW: STUDENT COMPLIANCE WITH SELECTIVE SERVICE

A male student cannot receive a grant, scholarship, loan or other financial assistance funded by state revenue, unless a statement of the individual's selective service status is completed with the institution or other entity granting or guaranteeing the financial assistance. This requirement also includes federal funds or gifts and grants accepted by this state and any loans guaranteed by the state of Texas (See [TEC, 51.9095](#)).

Typically, a student's selective service status is confirmed through the online FAFSA process which validates registration directly with the Selective Service Administration. If a student's selective service status is confirmed on the Institutional Student Information Record (ISIR), no statement needs to be collected by the institution.

The statement below **must** be collected for all male applicants, each academic year, in the following situations:

- A FAFSA that that is flagged "not registered" must be reviewed by the institution to determine if the student is exempt and may be eligible for federal or state financial aid programs. If the student is **exempt**, additional documentation should be collected by the institution to verify the circumstances. The institution can determine what additional documentation to collect for this verification.
- For a student that does not complete a FAFSA, the required statement and back-up documentation must be collected by the institution to verify the current selective service status if the individual is applying for any state financial aid.

NOTE: The institution has discretion to determine how to collect this required statement, which can be done electronically or on paper (e.g. online form, signed award letter, etc.). The statement and all documentation must be retained in the student's record and be made available if requested during a program review or audit. Each statement collected must be retained with the student's records for 7 years after the date of completion for the applicable award period (See [TAC, Section 22.4\(a\)\(2\)\(A\)](#)).

Required Statement of Selective Service Status

Are you currently registered for Selective Service, as required by federal law?

Registered (Proof of registration required)
 Not Registered
 Exempt (Documentation required)

I, _____, hereby certify that the selective service status provided is true and correct. I understand that I must provide documentation if requested by my institution that I may be required to complete a new statement for each academic year for continued eligibility.

Student Signature _____
Date

HARDSHIP PROVISIONS ([19 TAC, SECTION 21.1088](#))

A student who fails to maintain the GPA and/or excessive hours requirement may be deemed eligible under a hardship provision. Each institution must adopt a hardship policy and have the policy available for public review upon request. All hardship decisions must be documented in the student's record and be available for submission to the THECB, if requested.

EXEMPTION FROM STUDENT TEACHING ([19 TAC, SECTION 21.1087](#))

- An individual who receives a baccalaureate degree required for a teaching certificate on the basis of higher education coursework completed while receiving an EAE award is not required to participate in any field experience or internship consisting of student teaching to receive a teaching certificate.
- An individual who receives a baccalaureate degree prior to receiving a first EAE award is not eligible for a student teaching exemption.

AWARDING



STOP: An EAE award for this program only applies to courses for which an institution receives formula funding.

Students receiving awards through the Educational Aide Exemption Program will be exempted from the payment of the total resident tuition and required fees, other than laboratory and class fees, for courses taken during the applicable term. Institutions must determine the applicant's eligibility to receive the exemption and notify both the applicant and the school district employing the applicant ([TEC, Section 54.363 \(d\)](#)).

REQUIRED MATCHING ([19 TAC, SECTION 21.1086](#))

Participation in the EAE program requires that institutions use institutional matching funds to cover at least 10% of each recipient's exemption. Institutions are not required to provide exemptions beyond those funded through appropriations plus a 10% institutional match.

PROCESSING FUNDS

REQUESTING PROGRAM FUNDS

When requesting funds, eligible institutions must submit a [Funds Request Form \(FRF\)](#). This form is available on the Student Financial Aid Programs Information Webpage under **Program Resources**.

! ALERT NEW: Beginning fall 2018, participating institutions will no longer receive the total EAE allocation as one lump sum at the start of the fall term. Eligible institutions **must** now submit a Funds Request Form on an as-needed basis to receive allocated funds.

RETURNING PROGRAM FUNDS

A [Return of Funds Form \(RFF\)](#) must be submitted before any funds are returned to the THECB. This form is available on the Student Financial Aid Programs Information Webpage under **Online Resources**.



B-ON-TIME LOAN PROGRAM

The Texas Higher Education Coordinating Board (THECB) Program Guidelines are intended to support institutions by highlighting requirements that appear in the Texas Education Code (TEC) and Title 19 of the Texas Administrative Code (TAC). When administering this program, institutions should always refer to the applicable statutes and rules. The information provided in this document is to be used solely as a resource and does not supersede the statute and/or rules for this program.

PROGRAM AUTHORITY AND PURPOSE [\(19 TAC, SECTION 22.329\)](#)


The Texas B-On-Time (BOT) Loan 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](#). The purpose of the BOT loan program is to improve and increase access to higher education in Texas.

ELIGIBLE INSTITUTIONS [\(19 TAC, SECTION 22.331\)](#)

Public and private/independent institutions of higher education as defined in [TEC Section 61.003 \(8\)](#) are eligible to make renewal awards only under the BOT program.

ELIGIBILITY

ELIGIBILITY REQUIREMENTS ([19 TAC, SECTION 22.333](#))

 **ALERT:** Beginning with the 2015-16 academic year, renewal awards **only** are authorized for the BOT Loan Program.

TO RECEIVE A RENEWAL AWARD, A STUDENT MUST:

- ✓ Be classified by the institution as a Texas resident or be entitled to pay resident tuition rates as a dependent child of a member of the U.S. armed forces
- ✓ Be registered with Selective Service, or be exempt
- ✓ Be eligible to receive federal financial aid
- ✓ Be enrolled full-time in a baccalaureate degree program
- ✓ Have completed at least 75 percent of the hours attempted in the most recent academic year
- ✓ Maintain an overall GPA of at least 2.5 on a four-point scale or its equivalent for all coursework attempted
- ✓ Be an undergraduate baccalaureate student that previously received an initial year award
- ✓ Have not earned a baccalaureate degree


DISCONTINUATION OF ELIGIBILITY ([19 TAC, SECTION 22.333](#))

A student may not receive a Texas B-On-Time loan for more than 150 semester credit hours or the equivalent.

If, in any given academic period, a student is no longer enrolled full-time and the THECB does not receive a refund of the BOT loan for that period, the dropped courses will be counted towards the calculation of the 150 SCH limit.

HARDSHIP PROVISIONS ([19 TAC, SECTION 22.335](#))

A student who is ineligible for the BOT Loan based on course load and completion requirements may be deemed eligible under a hardship provision. Participating institutions must adopt a hardship policy and have the policy available for public review upon request. All hardship decisions must be documented in the student's record and be available for submission to the THECB, if requested.

 **STOP:** No student enrolled for fewer than six hours may receive a BOT award, regardless of the circumstances including graduation.

ADDITIONAL INFORMATION

GPA APPEALS

A student who does not meet the GPA requirement at the end of a spring term can appeal to have courses taken at other institutions included in the GPA calculation. In this case, all grade points previously earned must be included in the overall GPA calculation.

REINSTATEMENT OF ELIGIBILITY

A student who fails to meet any of the requirements for receiving a continuation award after completion of any year, may not receive a BOT loan until he or she completes the necessary coursework to meet the completion and GPA requirements for a continuation award.

LOAN ORIGINATION

BOT loans may be originated in the HelmNet Loan Portal only for eligible renewal recipients. If an entered SSN does not have a prior BOT Loan associated with it, the system will not allow an application to be created or certified.

SELECTIVE SERVICE STATEMENT (19 TAC, SECTION 22.3)

! ALERT NEW: STUDENT COMPLIANCE WITH SELECTIVE SERVICE

A male student cannot receive a grant, scholarship, loan or other financial assistance funded by state revenue, unless a statement of the individual's selective service status is completed with the institution or other entity granting or guaranteeing the financial assistance. This requirement also includes federal funds or gifts and grants accepted by this state and any loans guaranteed by the state of Texas (See [TEC, 51.9095](#)).

Typically, a student's selective service status is confirmed through the online FAFSA process which validates registration directly with the Selective Service Administration. If a student's selective service status is confirmed on the Institutional Student Information Record (ISIR), no statement needs to be collected by the institution.

The statement below **must** be collected for all male applicants, each academic year, in the following situations:

- A FAFSA that that is flagged "not registered" must be reviewed by the institution to determine if the student is exempt and may be eligible for federal or state financial aid programs. If the student is **exempt**, additional documentation should be collected by the institution to verify the circumstances. The institution can determine what additional documentation to collect for this verification.
- For a student that does not complete a FAFSA, the required statement and back-up documentation must be collected by the institution to verify the current selective service status if the individual is applying for any state financial aid.

NOTE: The institution has discretion to determine how to collect this required statement, which can be done electronically or on paper (e.g. online form, signed award letter, etc.). The statement and all documentation must be retained in the student's record and be made available if requested during a program review or audit. Each statement collected must be retained with the student's records for 7 years after the date of completion for the applicable award period (See [TAC, Section 22.4\(a\)\(2\)\(A\)](#)).

Required Statement of Selective Service Status

Are you currently registered for Selective Service, as required by federal law?

Registered (Proof of registration required)
 Not Registered
 Exempt (Documentation required)

I, _____, hereby certify that the selective service status provided is true and correct. I understand that I must provide documentation if requested by my institution that I may be required to complete a new statement for each academic year for continued eligibility.

Student Signature _____
Date

SATISFACTORY ACADEMIC PROGRESS (SAP) ([19 TAC, SECTION 22.333](#))

A student’s SAP eligibility is determined at the end of each academic year. A student must complete 75% of total attempted hours in the academic year and have a minimum 2.5 cumulative GPA on a 4-point scale, or its equivalent.

END OF EACH ACADEMIC YEAR	SATISFACTORY ACADEMIC PROGRESS (SAP) REQUIREMENTS	
	75% completion rate in the most recent academic year	2.5 cumulative GPA on a 4-point scale

AWARDING

In determining the amount of a BOT award, students can receive funding only up to their cost of attendance (COA). A student’s COA includes tuition and fees, allowances for books and supplies, room and board, transportation expenses, and miscellaneous personal expenses. When certifying a BOT loan, the institution is confirming that the amount of the loan does not exceed the difference between the COA and other forms of student assistance (except Federal Plus loans) for which the student is eligible (See [19 TAC, Section 22.334](#)).

! ALERT NEW: BOT loan funds must be certified by **February 20**. Allocated funds that have not been certified by this deadline will be used in the reallocation process. Funds redistributed during the reallocation process will have a separate deadline published. All disbursements on certified loans must be made no later than **May 4**. Any funds not disbursed by the May 4 deadline will be forfeited by the institution.

BOT 2018-19 AWARD MAXIMUMS

INSTITUTION TYPE	AWARD MAX/YEAR	AWARD MAX/SEMESTER
PUBLIC UNIVERSITIES, HRIs AND PRIVATE/INDEPENDENT INSTITUTIONS	\$9,348	\$4,674
PUBLIC STATE COLLEGES	\$5,862	\$2,931
PUBLIC TECHNICAL INSTITUTES	\$5,590	\$2,795
PUBLIC COMMUNITY COLLEGES	\$3,150	\$1,575

A 3% ORIGINATION FEE WILL BE DEDUCTED FROM THE LOAN PROCEEDS.

PROCESSING FUNDS

REQUESTING PROGRAM FUNDS

Institutions can begin disbursing loan funds on September 6, 2018 for the 2018-19 academic year. Funds will not be processed until the promissory note is signed by the borrower and the Financial Aid Administrator certifies the loan using one of the following methods:

- Certify the loan through the [HelmNet](#) loan portal; **OR**
- Submit a **Commonline Loan Certification File** using the [MOVEit DMZ](#) secure file transfer portal.

RETURNING PROGRAM FUNDS

A [Return of Funds Form \(RFF\)](#) must be submitted and approved before any funds are returned to the THECB. This form is available on the Student Financial Aid Programs Information Webpage under **Online Resources**.



STOP: TIMELY DISTRIBUTION OF FUNDS ([19 TAC, Section 22.2](#))

- Institutions have 3 business days after receiving the funds to apply the funds to a student's account
- Institutions have 6 business days after receiving the funds to return undisbursed funds
- Institutions have 45 calendar days from the date a student becomes ineligible to return disbursed funds
- Institutions have 120 calendar days to return funds after a student has notified the institution of a decision to cancel the award

REPAYMENT

BOT loans have a 6-month grace period beginning on the date the student ceases to be enrolled at least half-time at an eligible institution. Repayment is scheduled to begin after the expiration of the 6-month grace period. The BOT loan has a 15-year repayment period or a minimum monthly payment of \$75.00. BOT loans have a 0% interest rate (See [19 TAC, Section 22.339](#)).

Deferments for education enrollment or periods of forbearance based on financial hardship are available.

FORGIVENESS REQUIREMENTS ([19 TAC, SECTION 22.337](#))

A BOT loan may be forgiven if the student provides the THECB an [Application for Forgiveness](#). Section two of this form must be completed by the institutional Registrar's office certifying that the student:

- Graduated with a B average, or a cumulative grade point average of at least 3.0 on a 4-point scale and:
 - Received a baccalaureate degree within four calendar years after the date the student initially enrolled in an eligible institution; or
 - Within five calendar years after the student initially enrolled in an eligible institution if the institution reports that the student graduated with a degree in architecture, engineering, or any other program that the institution certifies to the Board is a program that requires more than four years to complete; or
- Graduated a B average, or with a cumulative grade point average of at least 3.0 on a 4-point scale with no more than six hours more than the number of credit hours required to complete a baccalaureate degree.
 - Total number of hours earned Includes transfer credit hours and excludes hours earned exclusively by examination, dual credit course hours, and hours earned for developmental coursework that an institution required the student to take under [TEC, Section 51.336](#) (relating to Success Initiative).

ADDITIONAL INFORMATION

APPEALS PROCESS

If a student disagrees with the decision about his or her eligibility for forgiveness, the student can send a dispute letter explaining their situation and reason for appealing to:

Director of Borrower Services
THECB
P.O. Box 12788
Austin, TX 78711
Fax: (512) 427-6423

FORGIVENESS DEADLINE

BOT Loans are automatically scheduled for repayment six months after the last date of a student's enrollment. While there is no deadline for completing the **B-On-Time Loan Application for Forgiveness**, submitting the application within 90 days after a student is no longer enrolled at least half-time will help avoid collection efforts.



COLLEGE ACCESS LOAN PROGRAM

The Texas Higher Education Coordinating Board (THECB) Program Guidelines are intended to support institutions by highlighting requirements that appear in the Texas Education Code (TEC) and Title 19 of the Texas Administrative Code (TAC). When administering this program, institutions should always refer to the applicable statutes and rules. The information provided in this document is to be used solely as a resource and does not supersede the statute and/or rules for this program.

PROGRAM AUTHORITY ([19 TAC, SECTION 22.43](#)) AND PURPOSE ([19 TAC, SECTION 22.42](#))

The College Access Loan (CAL) program is part of the Hinson-Hazlewood College Student Loan Program, 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](#). The CAL program provides alternative educational loans to Texas students who are unable to meet the Cost of Attendance (COA). The amount of federal aid that a student is eligible for (regardless of whether the funds are accepted) must be deducted from the COA in determining the CAL loan amount.

ELIGIBLE INSTITUTIONS ([19 TAC, SECTION 22.45](#))

The following institutions and entities located in Texas are eligible to participate in the CAL program:

- Public or private nonprofit institutions of higher education, including junior colleges, accredited by a recognized accrediting agency as defined in [TEC, Section 61.003](#); OR
- Entities, including Regional Education Services Centers, approved by the State Board of Educator Certification to offer an alternative certification program.

ELIGIBILITY

ELIGIBILITY REQUIREMENTS ([19 TAC, SECTION 22.46 & 22.47](#))

THE STUDENT MUST MEET FOLLOWING ELIGIBILITY REQUIREMENTS:	STUDENTS AND COSIGNERS MUST MEET THE FOLLOWING CREDIT APPROVAL REQUIREMENTS:
<ul style="list-style-type: none"> ✓ Be classified by the institution as a Texas resident ✓ Be registered with Selective Service, or be exempt ✓ Have insufficient resources to finance his or her education ✓ Be enrolled at least half-time in: <ul style="list-style-type: none"> • A course of study leading to a certificate, an associate, baccalaureate, graduate, or higher degree; OR • An approved alternative educator certification program ✓ Meet the satisfactory academic progress (SAP) requirements set by the institution ✓ Receive a favorable credit evaluation or provide a cosigner who has a good credit standing and meets other requirements 	<ul style="list-style-type: none"> ✓ Have an Experian VantageScore of 650 or higher ✓ Not have public records such as tax liens or bankruptcy proceedings ✓ Have a minimum of 4 credit trade lines, excluding student loans or authorized user accounts ✓ Not have defaulted on any federal or private education loans
	<p style="text-align: center;">COSIGNERS MUST:</p> <ul style="list-style-type: none"> ✓ Be at least 21 years of age ✓ Have a regular source of income ✓ Not be the borrower or the spouse of the borrower ✓ Receive a favorable credit evaluation ✓ Be a U.S. citizen or a permanent U.S. resident and reside in the U.S. or in a U.S. territory

ADDITIONAL INFORMATION

HELMNET LOAN PORTAL

THECB's Higher Education Loan Management System (HELMS) allows institutions, students and cosigners to manage loan accounts through a secure online portal called HelmNet.

LOGIN PAGE

[HelmNet Portal](#)

- Institutions must submit a [System Authorization Form](#) to THECB to request access to certify a loan.
- Students and cosigners must each create an online account to apply for a loan or view the status of any loans with THECB.

CAL INTEREST RATE CHANGE

- Effective May 14, 2018, Applications certified on or after that date will carry a fixed annual interest rate of 5.30%.
- Applications certified prior to May 14, 2018, will carry a fixed annual interest rate of 6.60%.

! ALERT: A student must be meeting the minimum satisfactory academic progress (SAP) requirements of the institution in the semester any loan is made (see [TEC, Section 52.32\(c\)](#)). Institutions have the flexibility to define what it means to meet SAP requirements. If a student is not meeting the institution's SAP, a documented appeal process may be used to determine if the student is eligible for CAL. A student can receive a CAL if a SAP appeal has been approved by the institution.

SELECTIVE SERVICE STATEMENT (19 TAC, SECTION 22.3)

! ALERT NEW: STUDENT COMPLIANCE WITH SELECTIVE SERVICE

A male student cannot receive a grant, scholarship, loan or other financial assistance funded by state revenue, unless a statement of the individual's selective service status is completed with the institution or other entity granting or guaranteeing the financial assistance. This requirement also includes federal funds or gifts and grants accepted by this state and any loans guaranteed by the state of Texas (See [TEC, 51.9095](#)).

Typically, a student's selective service status is confirmed through the online FAFSA process which validates registration directly with the Selective Service Administration. If a student's selective service status is confirmed on the Institutional Student Information Record (ISIR), no statement needs to be collected by the institution.

The statement below **must** be collected for all male applicants, each academic year, in the following situations:

- A FAFSA that that is flagged "not registered" must be reviewed by the institution to determine if the student is exempt and may be eligible for federal or state financial aid programs. If the student is **exempt**, additional documentation should be collected by the institution to verify the circumstances. The institution can determine what additional documentation to collect for this verification.
- For a student that does not complete a FAFSA, the required statement and back-up documentation must be collected by the institution to verify the current selective service status if the individual is applying for any state financial aid.

NOTE: The institution has discretion to determine how to collect this required statement, which can be done electronically or on paper (e.g. online form, signed award letter, etc.). The statement and all documentation must be retained in the student's record and be made available if requested during a program review or audit. Each statement collected must be retained with the student's records for 7 years after the date of completion for the applicable award period (See [TAC, Section 22.4\(a\)\(2\)\(A\)](#)).

Required Statement of Selective Service Status

Are you currently registered for Selective Service, as required by federal law?

Registered (Proof of registration required)
 Not Registered
 Exempt (Documentation required)

I, _____, hereby certify that the selective service status provided is true and correct. I understand that I must provide documentation if requested by my institution that I may be required to complete a new statement for each academic year for continued eligibility.

Student Signature _____
Date

AWARDING

Students may receive CAL funding to cover reasonable expenses only, not to exceed the Cost of Attendance (COA) (See [19 TAC, Section 22.49](#)) and [IRS Certification Requirements](#). When certifying a CAL loan, institutions are confirming that the amount of the requested loan is greater than \$100 and does not exceed the difference between the student's COA and other forms of financial assistance for which the student is eligible. The other forms of student assistance that must be considered when determining the amount of a CAL eligibility include:

- Free sources of student aid, such as gifts, grants and scholarships; **AND**
- The amount of any Federal Perkins loan and/or Federal Direct Stafford loan (including subsidized and unsubsidized) that a student borrower is eligible to receive. Eligibility for Federal PLUS loans should not be considered when determining the amount of CAL.

ALERT NEW: PROCESS FOR INCREASING A COLLEGE ACCESS LOAN (CAL)

A CAL can never exceed the amount certified by the institution but there are several common situations where a CAL can be increased.

- The institution certifies a loan and the student cancels all or part of the loan but later ends up needing the money during the loan period. The institution can request, in writing through CONTACT US, that the loan be increased up to the original certification amount. The institutions must confirm that the loan does not exceed the difference between the student's COA and other forms of financial assistance for which the student is eligible.
- The institution certifies a loan and the student becomes ineligible prior to the disbursement from the THECB. The institution cancels the loan but the student later becomes eligible during the loan period. The institution can request, in writing through CONTACT US, that the loan be reinstated up to the original certification amount. The institutions must confirm that the loan does not exceed the difference between the student's COA and other forms of financial assistance for which the student is eligible.
- The institution certifies a loan and returns funds during the loan period to the THECB. The institution can request, in writing through CONTACT US, that the loan be reinstated up to the original certification amount. The institutions must confirm that the loan does not exceed the difference between the student's COA and other forms of financial assistance for which the student is eligible.

A CAL **cannot** be increased in the following situation:

- The institution certifies LESS than what the student was pre-approved to borrow. The student ends up needing more money after certification (ex. additional tuition and fees) and wants to increase his or her current loan amount. The loan amount **CANNOT** be increased beyond the certified amount by the institution even though the student may have been pre-approved for more than what was certified.

PROCESSING FUNDS

REQUESTING PROGRAM FUNDS

Institutions can certify eligible CAL loans throughout the academic year on an as-needed basis. Funds will not be disbursed until the promissory note is signed by the borrower (and cosigner, when applicable) and the Financial Aid Administrator certifies the loan using the following two methods:

- Certify the loan through the [HelmNet](#) loan portal; **OR**
- Submit a **Commonline Loan Certification File** using the [MOVEit DMZ](#) secure file transfer portal.

RETURNING PROGRAM FUNDS

A [Return of Funds Form \(RFF\)](#) must be submitted and approved before any funds are returned to the THECB. This form is available on the Student Financial Aid Programs Information Webpage under **Online Resources**.



STOP: TIMELY DISTRIBUTION OF FUNDS ([19 TAC, Section 22.2](#))

- Institutions have 3 business days after receiving the funds to apply the funds to a student's account
- Institutions have 6 business days after receiving the funds to return undisbursed funds
- Institutions have 45 calendar days from the date a student becomes ineligible to return disbursed funds
- Institutions have 120 calendar days to return funds after a student has notified the institution of a decision to cancel the award

REPAYMENT

CAL loans have a 6-month grace period beginning on the date the student ceases to be enrolled at least half-time at an eligible institution. Repayment is scheduled to begin after the expiration of the 6-month grace period (See [19 TAC, Section 22.53](#)). All loans have a minimum monthly repayment amount of \$50. There is a maximum repayment period of 10 years for loans with a principal balance under \$30,000, and a maximum repayment period of 20 years for loans with a principal balance of \$30,000 or more. If the balance is greater than \$30,000 at the time the account initially enters repayment, the monthly payment amount must be enough to pay off the entire debt in no more than 20 years. The CAL will not be sold to another lender.



TEXAS COLLEGE WORK-STUDY PROGRAM

The Texas Higher Education Coordinating Board (THECB) Program Guidelines are intended to support institutions by highlighting requirements that appear in the Texas Education Code (TEC) and Title 19 of the Texas Administrative Code (TAC). When administering this program, institutions should always refer to the applicable statutes and rules. The information provided in this document is to be used solely as a resource and does not supersede the statute and/or rules for this program.

PROGRAM AUTHORITY AND PURPOSE ([19 TAC, SECTION 22.127](#))

The Texas College Work-Study (TCWS) program is authorized by [TEC, Chapter 56, Subchapter E, Section 56.073](#). Rules establishing procedures to administer the subchapter can be found in [Title 19 of the TAC, Chapter 22, Subchapter G](#). The purpose of the TCWS program is to provide employment to eligible students with financial need. These positions are funded by a combination of state appropriations and funds from employers.

STATE PRIORITY DEADLINE ([TEC, SECTION 56.008 AND 19 TAC, SECTION 22.6](#) – Formerly: 19 TAC, 21.10)

The THECB provides a uniform priority deadline for applications that qualify for financial assistance in an academic year. General Academic Teaching Institutions (GATIs) in Texas **must** publicize and use **March 15** as the state priority deadline for identifying eligible students to be given priority in receiving awards through the state financial aid programs. All other public institutions are encouraged to use this state priority deadline. Institutions may define how their students must meet the priority deadline. Institutions are encouraged to adopt a policy and procedure to ensure students are awarded consistently for this program.

! ALERT NEW: Beginning with the 2019-20 academic year and all years thereafter, all General Academic Teaching Institutions (GATIs) in Texas must publicize and use **January 15** as the state priority deadline. All other public and private/independent institutions are encouraged to use this deadline.

NOTE: The 2019-20 Free Application for Federal Student Aid (FAFSA) and Texas Application for State Financial Aid (TASFA) will use **January 15, 2019** as the state priority deadline date.

ELIGIBLE INSTITUTIONS ([19 TAC, SECTION 22.129](#))

Any public, private, or independent institution of higher education as defined in [TEC, Section 61.003](#), except theological or religious seminary institutions, is eligible to participate in the TCWS program.

ELIGIBILITY

ELIGIBILITY REQUIREMENTS ([19 TAC, SECTION 22.130](#))

TO RECEIVE A TCWS AWARD, A STUDENT MUST:

- ✓ Be classified by the institution as a Texas resident
- ✓ Be registered with Selective Service, or be exempt
- ✓ Have financial need
- ✓ Be enrolled at least 1/2 time in a plan leading to a degree or certification
- ✓ Not be a recipient of an athletic scholarship (i.e. the student is obliged to play an intercollegiate sport as a condition of receiving the scholarship) during any semester TCWS is awarded
- ✓ Not be enrolled in a seminary or other program leading to ordination or licensure to preach for a religious sect or to be a member of a religious order

ELIGIBLE EMPLOYERS ([19 TAC, SECTION 22.131](#))

Participating institutions may enter into agreements with outside employers to participate in the TCWS program. To be eligible to participate, an employer must:

- Provide part-time employment to an eligible student in non-partisan and non-sectarian activities.
- Provide employment that is related to the student's academic interests, when possible.
- Use TCWS program positions only to supplement and not to supplant positions normally filled by persons not eligible to participate in the program.

ADDITIONAL INFORMATION

RESIDENCY ELIGIBILITY

If a nonresident student is eligible to pay resident tuition, he/she is not eligible to receive TCWS since eligibility requires that the participant be a Texas Resident.

An otherwise eligible affidavit student (classified as a Texas resident) who can provide the appropriate documentation proving eligibility to be employed in the United States, may secure employment through the TCWS program. This includes Deferred Action for Childhood Arrivals (DACA) recipients.

GRADUATE STUDENT ELIGIBILITY

Eligible graduate students must be enrolled at least half-time, which is defined by the state as 4.5 hours. To meet program eligibility requirements, the institution must comply with the state's definition of half-time enrollment for a graduate student recipient, even if the institution's definition is different.

SELECTIVE SERVICE STATEMENT (19 TAC, SECTION 22.3)

! ALERT NEW: STUDENT COMPLIANCE WITH SELECTIVE SERVICE

A male student cannot receive a grant, scholarship, loan or other financial assistance funded by state revenue, unless a statement of the individual's selective service status is completed with the institution or other entity granting or guaranteeing the financial assistance. This requirement also includes federal funds or gifts and grants accepted by this state and any loans guaranteed by the state of Texas (See [TEC, 51.9095](#)).

Typically, a student's selective service status is confirmed through the online FAFSA process which validates registration directly with the Selective Service Administration. If a student's selective service status is confirmed on the Institutional Student Information Record (ISIR), no statement needs to be collected by the institution.

The statement below **must** be collected for all male applicants, each academic year, in the following situations:

- A FAFSA that that is flagged "not registered" must be reviewed by the institution to determine if the student is exempt and may be eligible for federal or state financial aid programs. If the student is **exempt**, additional documentation should be collected by the institution to verify the circumstances. The institution can determine what additional documentation to collect for this verification.
- For a student that does not complete a FAFSA, the required statement and back-up documentation must be collected by the institution to verify the current selective service status if the individual is applying for any state financial aid.

NOTE: The institution has discretion to determine how to collect this required statement, which can be done electronically or on paper (e.g. online form, signed award letter, etc.). The statement and all documentation must be retained in the student's record and be made available if requested during a program review or audit. Each statement collected must be retained with the student's records for 7 years after the date of completion for the applicable award period (See [TAC, Section 22.4\(a\)\(2\)\(A\)](#)).

Required Statement of Selective Service Status

Are you currently registered for Selective Service, as required by federal law?


Registered Not Registered Exempt
(Proof of registration required) (Documentation required)

I, _____, hereby certify that the selective service status provided is true and correct. I understand that I must provide documentation if requested by my institution that I may be required to complete a new statement for each academic year for continued eligibility.

Student Signature Date

AWARDING

Institutions must use the TCWS allocation for employment during the 9-month academic year (fall and spring terms). A TCWS award cannot exceed the student's calculated need, which includes state and employer matching funds.

 **For Example:** If an institution's TCWS funding covers 10 positions, the institution would need to ensure that at least 2 (minimum), but no more than 5 (maximum), are off-campus to meet the rule requirement.

10 Total Positions X 20% = 2 Off-Campus Positions - Minimum

10 Total Positions X 50% = 5 Off-Campus Positions - Maximum

Each participating institution must ensure that at least 20 percent, but no more than 50 percent, of the employment positions provided through the TCWS program in an academic year are off-campus through an eligible employer (See [19 TAC, Section 22.131](#)).

OVER AWARDS ([19 TAC, SECTION 22.132](#))

If, after an award has been offered, a student receives other assistance that exceeds the student's financial need, the institution is not required to adjust the award unless the sum of the excess resources is greater than \$300.

SUMMER AWARDS ([19 TAC, SECTION 22.133](#))

Institutions may use **reallocated** funds for summer awards, if given specific permission by the THECB. Reallocated funds for summer awards must be paid by **August 31** of the current fiscal year.

REQUIRED MATCHING ([19 TAC, SECTION 22.131](#))

Participating **for-profit** employers must:

- Provide at least 50 percent of an employed student's wages and 100 percent of other employee benefits for the employed student.

Participating **non-profit** employers must:

- Provide at least 25 percent of an employed student's wages and 100 percent of other employee benefits for the employed student from sources other than federal college work-study program funds, unless institutions are eligible for a waiver of matching funds. Institutions that are eligible for Title III funds from the U.S. Department of Education (ED) are exempt from the TCWS requirement that nonprofit employers provide 25% of an employed student's wages. To qualify for this exemption, institutions must submit a current copy of the Title III eligibility letter to the THECB.

PROCESSING FUNDS

REQUESTING PROGRAM FUNDS

At the start of the fiscal year, each participating institution's full allocation of funds will be disbursed. Funds for public universities, Health-Related Institutions (HRIs) and technical institutes, funds will be transferred to each institution's cost center at the Comptroller's Office. Funds for community colleges and private/independent institutions will be sent to each institution's designated bank or other fiduciary institution, via direct deposit or Automated Clearing House (ACH).

RETURNING PROGRAM FUNDS

Unused funds must be returned to the THECB after the end of the spring term. A [Return of Funds Form \(RFF\)](#) must be submitted before any funds are returned to the THECB. This form is available on the Student Financial Aid Programs Information Webpage under **Online Resources**.

AUTHORITY TO TRANSFER FUNDS ([19 TAC, SECTION 22.135](#))

⚠️ ALERT: Institutions participating in combination of TCWS, TEXAS Grant, TEOG, and TEG may transfer up to 10% of the institution’s total annual program allocation or \$20,000 (whichever is less) between programs within the relevant fiscal year. Institutions requesting a transfer between programs must submit an [Authority to Transfer Form](#) by **January 18**.

If the institution transfers grant funds (TEXAS Grant, TEOG, and TEG) to TCWS, the transferred TCWS funds must be encumbered by **February 20**. If funds are being transferred from TCWS to a grant (TEXAS Grant, TEOG, and TEG), the institutions must return the TCWS funds by **January 18** but will have until **August 1** to request the transferred funds.

FROM		TO	Deadline to Encumber
TEXAS Grant TEOG TEG	→	TCWS	FEBRUARY 20
	OR		
TCWS	→	TEXAS Grant TEOG TEG	AUGUST 1

Funds can only be transferred from a grant to TCWS or vice versa, never from a grant to a grant.

APPENDIX 1: SACS PROGRAM LEVELS

Institution Name	SACS Level	UNDERGRADUATE TUITION RATE PER SCH	GRADUATE TUITION RATE PER SCH
Abilene Christian University	5	\$196	\$260
Austin College	3	\$190	\$273
Baylor University	6	\$245	\$316
Concordia University Texas	5	\$196	\$260
Dallas Baptist University	5	\$196	\$260
East Texas Baptist University	3	\$190	\$273
Hardin-Simmons University	5	\$196	\$260
Houston Baptist University	5	\$196	\$260
Howard Payne University	3	\$190	\$273
Huston-Tillotson University	3	\$190	\$273
Jacksonville College	1	\$62	n/a
Jarvis Christian College	2	\$60	n/a
LeTourneau University	3	\$190	\$273
Lubbock Christian University	3	\$190	\$273
McMurry University	3	\$190	\$273
Our Lady of the Lake University	5	\$196	\$260
Parker University	5	\$196	\$260
Rice University	6	\$245	\$316
Schreiner University	3	\$190	\$273
Southern Methodist University	6	\$245	\$316
Southwestern Adventist University	3	\$190	\$273
Southwestern Assemblies of God University	5	\$196	\$260
Southwestern Christian College	2	\$60	n/a
Southwestern University	2	\$60	n/a
St. Edward's University	3	\$190	\$273
St. Mary's University	5	\$196	\$260
Texas Chiropractic College	5	\$196	\$260
Texas Christian University	6	\$245	\$316
Texas College	2	\$60	n/a
Texas Lutheran University	3	\$190	\$273
Texas Wesleyan University	5	\$196	\$260
The University of Dallas	5	\$196	\$260
Trinity University	3	\$190	\$273

University of Mary Hardin-Baylor	5	\$196	\$260
University of St. Thomas	5	\$196	\$260
University of the Incarnate Word	6	\$245	\$316
Wayland Baptist University	5	\$196	\$260
Wiley College	2	\$60	n/a

For example: Institution Current Tuition Rate Per SCH = \$550
 Institution SACS Level = 2

To calculate tuition differential for an undergraduate student who is enrolled in 12 SCH in the fall and 12 SCH in the spring:

$$\$550 \quad - \quad \$60 \quad = \quad \$490 \quad \times \quad 24\text{SCH} \quad = \quad \mathbf{\$11,760}$$

$$\text{Institution Current Tuition} \quad - \quad \text{SACS avg.} \quad = \quad \text{Difference} \quad \times \quad \text{Total SCH} \quad = \quad \text{Tuition Differential}$$

APPENDIX 2: QUICK REFERENCES

CONTACT FINANCIAL AID SERVICES	
By phone: (844) 792-2640	
Contact us by completing an online inquiry form and select “Financial Aid Question” as the Contact Reason.	
OTHER RESOURCES FOR INSTITUTIONS	
General program information for institutions	Student Financial Aid Programs Information Webpage
General loan information	HHloans
Texas Program Statutes	Texas Education Code
Texas Program Rules	Texas Administrative Code
Information concerning programs, procedures, allocations, and other topics will be communicated to institutions through the GovDelivery system. To receive these communications, interested individuals must subscribe.	GovDelivery
Federal Selective Service Requirement Guide	Who Must Register Chart
AVAILABLE FORMS	
TEXAS Grant, TEOG, TEG, TCWS	Authority to Transfer
A form is required when requesting funds for all state grant programs	Funds Request Portal
A form is required when requesting funds for Bilingual Education Scholarship	Bilingual Education Scholarship Funds Request Form
A form is required when requesting funds for Educational Aide Exemption program funds.	Educational Aide Exemption Funds Request Form
A form is required when returning funds for all state grant, scholarship, Educational Aide Exemption, and loan program funds.	Grants and Special Programs Online Return of Funds Form Loan Programs Online Return of Funds Form
CALENDAR	
Institutional Calendar	