2019-20 State Financial Aid Program Guidelines

Texas Higher Education Coordinating Board

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 any to the program. The purpose of the TEXAS Grant Program is to provide financial assistance to eligible students attending Texas public institutions of higher education.

STATE PRIORITY DEADLINE (TEC, SECTION 56.008 and 19 TAC, SECTION 22.6)

The THECB provides a uniform priority deadline for applications that qualify for state-funded financial assistance in an academic year. General Academic Teaching Institutions (GATIs) in Texas, as defined in TEC, Section 61.003(3), must publicize and use **January 15** as the 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 and are encouraged to adopt a policy describing the actions that students must take to meet the deadline.

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 award to students who received an IY award prior to fall 2014 through a community college, public state college, or public technical institute.

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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
- ✓ 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)

⚠ **ALERT NEW: Priority Expected Family Contribution (EFC)**

The **priority EFC** set by the THECB should only serve as a method for prioritizing IY awards for eligible students, and is not an eligibility requirement to receive an award. The calculated priority EFC for 2019-20 is **$5,875** (See 19 TAC, Section 22.228(e)).

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.

PRIVATE HIGH SCHOOL CERTIFICATION

To determine eligibility for a student who graduated from a private high school in Texas, the institution of higher education must receive a certification form from the accredited 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.

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.

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RENEWAL ELIGIBILITY REQUIREMENTS (19 TAC, SECTION 22.228)

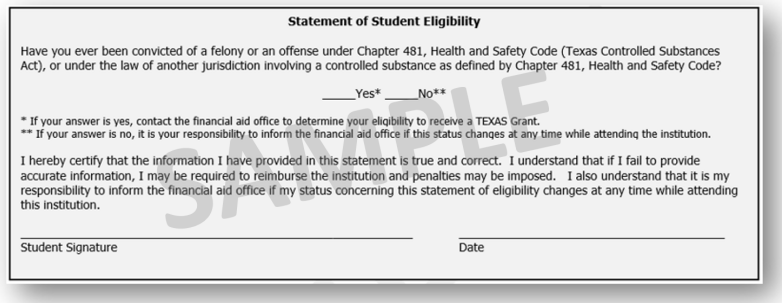
TO RECEIVE AN RY AWARD, A STUDENT MUST:

- ✓ 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)

CONTROLLED SUBSTANCE RESTRICTIONS (19 TAC, SECTION 22.230)

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 must be retained for 7 years after the students completion of the award period (See TAC, Section 22.4(a)(2)(A)).

The institution has the flexibility to determine the wording of the statement and the frequency with which it is collected. A **sample** statement is provided below:



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 _____

SAMPLE

A student is not eligible to receive a TEXAS Grant award if convicted of a felony or an offense under the law in any jurisdiction involving a controlled substance as defined in Chapter 481, Health and Safety Code (Texas Controlled Substances Act), unless he or she meets **all** other eligibility requirements and **one** of the following conditions exists:

- A certificate of discharge by the Texas Department of Criminal Justice or a correctional facility has been issued or the student 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**
- 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.

NOTE: Institutions should consult with their legal counsel concerning questions about individual cases

SELECTIVE SERVICE STATEMENT (19 TAC, SECTION 22.3)

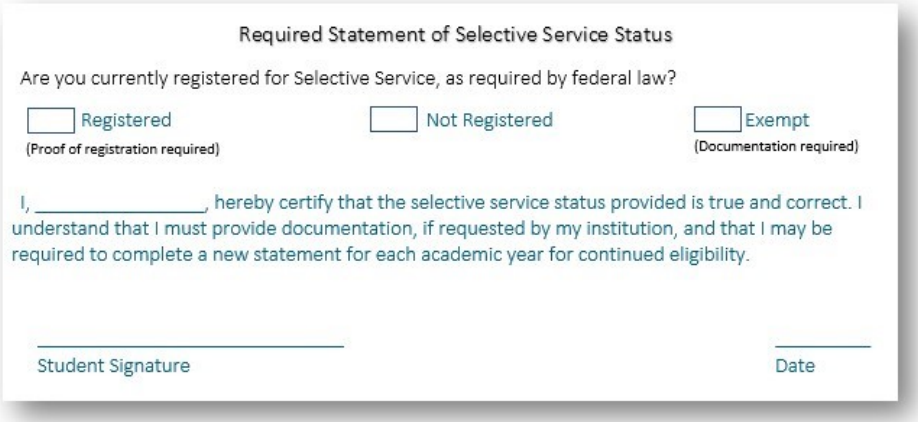
In accordance with TEC, 51.9095, male students may not receive financial assistance without filing a **Selective Service Status Statement** with their institution or other entity granting or guaranteeing the assistance. Financial assistance includes grants, scholarships, loans or other assistance funded by state revenue, including federal funds or gifts and grants accepted by the state.

When is a statement NOT required?

A **Selective Service Status Statement** is not required when a student's registration is confirmed on the Institutional Student Information Record (ISIR). The confirmation on the ISIR will serve as the student's signed statement since the Department of Education validates registration directly with the Selective Service System (SSS) through a database match for male students who complete the Free Application for Federal Student Aid (FAFSA).

When is a statement required?

- For a male student that completes a FAFSA but is flagged "not registered" on the ISIR, the institution must determine the student's status.
  - o If the student is **registered**, the institution must collect the status statement and proof of registration which can be used for subsequent semesters.
  - o If the student is **exempt**, the institution must collect the status statement and proof of exemption based on the student's circumstances. The institution can determine what additional documentation to collect to verify the exemption.
- For a male student that does not complete a FAFSA, the required status 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.



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, and that I may be required to complete a new statement for each academic year for continued eligibility.

_____ Student Signature _____ Date

ADDITIONAL INFORMATION

FREQUENCY COLLECTING THE STATEMENT

If the student's status will NOT change, the statement and supporting documentation can be used for subsequent semesters (e.g., the individual entered the U.S. after the eligible age to register).

In the event the student's status could change, the statement must be collected each academic year until the male student is registered or determined exempt (e.g., student is under 18).

METHOD FOR COLLECTING THE STATEMENT

The institution has discretion to determine how to collect this required status statement, which can be done electronically or on paper (e.g., online form, signed award letter, etc.).

RETENTION SCHEDULE

The status 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 status 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)).

REPROCESSED ISIRS

If the student's most recent ISIR transaction has been reprocessed by the Central Processing System (CPS) and the registration with SSS was confirmed, the institution does not need to collect the status statement or any documentation.

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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: • 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: • 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, and 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 two semesters 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 or its equivalent.

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 in the most recent academic year	2.5 cumulative GPA on a 4-point scale or its equivalent

NOTE: 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. If the resulting GPA meets or exceeds the program's academic progress requirement, an otherwise eligible student may receive an award in the following term.

AWARDING

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 allocated funds 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 **January 15** state priority deadline should be awarded first.
- If funding remains, the next students to be awarded are those who met the **January 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).

Beginning in the 2018-19 award year, the reallocation process was eliminated. Institutions have until the close of business on **August 1** to request grant funding (or the first working day thereafter if it falls on a weekend or holiday). Extending the award year through August allows institutions to award students attending the summer terms, if otherwise eligible. Students may be issued a total of 3 awards (Fall, Spring, and Summer) in an academic year.

ADDITIONAL INFORMATION

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, unless deemed eligible by the institution under a hardship provision.

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's completed hours.

TEXAS Grant Semester Maximum

Students receiving a TEXAS Grant cannot exceed the **semester** maximum for fall, spring, and summer.

- The award maximum is $4,896 per semester.
- A student could receive up to $14,688 for the 2019-20 award year.
- Target awards are still encouraged ($2,500 per semester = up to $7,500).

TEXAS GRANT 2019-20 AWARD MAXIMUMS				
INSTITUTION TYPE	YEAR MAX	SEMESTER MAX	TARGET YEAR MAX	TARGET SEMESTER MAX
PUBLIC UNIVERSITIES, HRIS	$14,688	$4,896	$7,500	$2,500

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	• 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	• Meet the Texas Success Initiatives (TSI) assessment thresholds or qualify for an exemption
CLASS STANDING	• 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	• 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)

REQUIRED MATCHING (19 TAC, SECTION 22.234)

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

⚠ **ALERT:** 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)

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

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 (SFAP) Information Webpage.

Institutions 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 (See 19 TAC, Section 22.236).

Each biennium, funds not requested in the first year can be carried forward for use in the second year. Any funds not requested in the second year of the biennium become available for redistribution as determined by the THECB.

DEFINITION: A biennium is the two-year state budget period.

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 SFAP 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)

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 online inquiry by the deadline listed below through CONTACT US (select the "Financial Aid Question" option in the drop-down selection under Contact Reason). The Financial Aid Services staff will respond to the institution to provide next steps for the process.

TRANSFER FROM:	TRANSFER TO:	AUTHORITY TO TRANSFER REQUEST DEADLINE DATE
TEXAS Grant →	TCWS	**JANUARY 18**
OR		
TCWS →	TEXAS Grant	**JUNE 14**
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 assistance to eligible students attending Texas two-year public institutions of higher education.

STATE PRIORITY DEADLINE (TEC, SECTION 56.008 and 19 TAC, SECTION 22.6)

The THECB provides a uniform priority deadline for applications that qualify for state-funded financial assistance in an academic year. General Academic Teaching Institutions (GATIs) in Texas (including Lamar State College-Orange and Lamar State College-Port Arthur) as defined in TEC, Section 61.003(3), must publicize and use **January 15** as the 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 and are encouraged to adopt a policy describing the actions that students must take to meet the deadline.

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:
✓ 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 ✓ 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)	✓ 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)

⚠ **ALERT NEW: Priority Expected Family Contribution (EFC)**

The **priority EFC** set by the THECB should only serve as a method for prioritizing IY awards for eligible students, and is not an eligibility requirement to receive an award. The calculated priority EFC for 2019-20 is **$5,875** (See 19 TAC, Section 22.256(a)(8)).

ADDITIONAL INFORMATION

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 student in the first 30 SCHs of an associate degree or certificate program.

SELECTIVE SERVICE STATEMENT (19 TAC, SECTION 22.3)

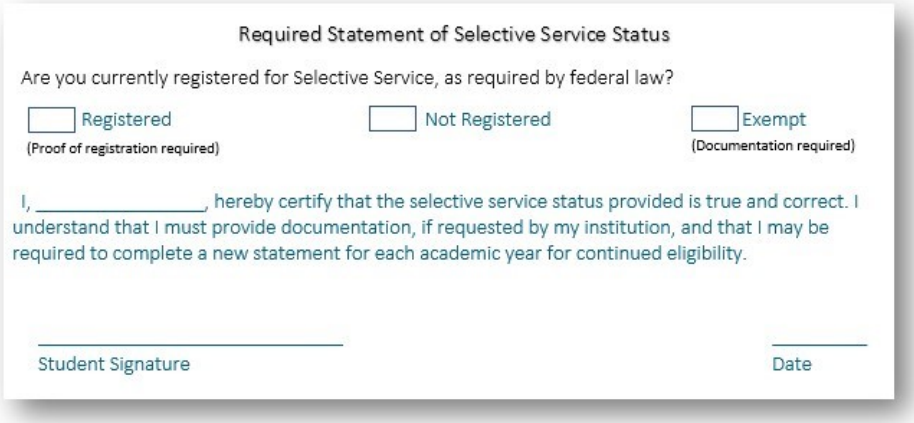
In accordance with TEC, 51.9095, male students may not receive financial assistance without filing a **Selective Service Status Statement** with their institution or other entity granting or guaranteeing the assistance. Financial assistance includes grants, scholarships, loans or other assistance funded by state revenue, including federal funds or gifts and grants accepted by the state.

When is a statement NOT required?

A **Selective Service Status Statement** is not required when a student's registration is confirmed on the Institutional Student Information Record (ISIR). The confirmation on the ISIR will serve as the student's signed statement since the Department of Education validates registration directly with the Selective Service System (SSS) through a database match for male students who complete the Free Application for Federal Student Aid (FAFSA).

When is a statement required?

- For a male student that completes a FAFSA but is flagged "not registered" on the ISIR, the institution must determine the student's status.
  - o If the student is **registered**, the institution must collect the status statement and proof of registration which can be used for subsequent semesters.
  - o If the student is **exempt**, the institution must collect the status statement and proof of exemption based on the student's circumstances. The institution can determine what additional documentation to collect to verify the exemption.
- For a male student that does not complete a FAFSA, the required status 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.



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, and that I may be required to complete a new statement for each academic year for continued eligibility.

_____ Student Signature _____ Date

ADDITIONAL INFORMATION

FREQUENCY COLLECTING THE STATEMENT

If the student's status will NOT change, the statement and supporting documentation can be used for subsequent semesters (e.g., the individual entered the U.S. after the eligible age to register).

In the event the student's status could change, the statement must be collected each academic year until the male student is registered or determined exempt (e.g., student is under 18).

METHOD FOR COLLECTING THE STATEMENT

The institution has discretion to determine how to collect this required status statement, which can be done electronically or on paper (e.g., online form, signed award letter, etc.).

RETENTION SCHEDULE

The status 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 status 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)).

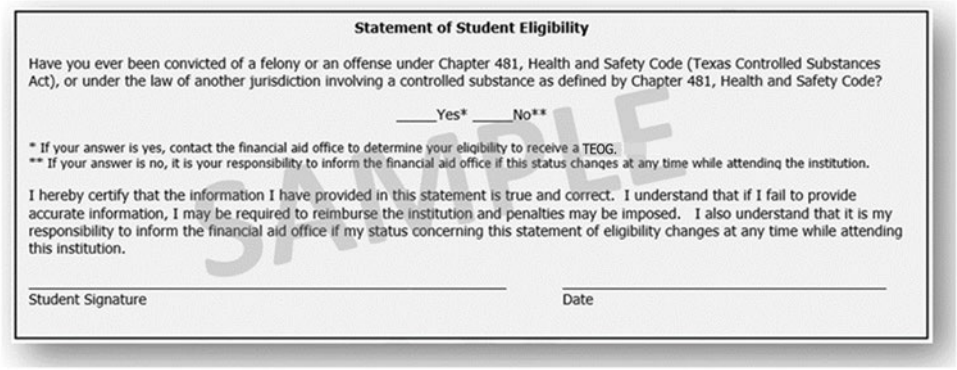
REPROCESSED ISIRS

If the student's most recent ISIR transaction has been reprocessed by the Central Processing System (CPS) and the registration with SSS was confirmed, the institution does not need to collect the status statement or any documentation.

CONTROLLED SUBSTANCE RESTRICTIONS (19 TAC, SECTION 22.256)

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 must be retained for 7 years after the students completion of the award period (See TAC, Section 22.4(a)(2)(A)).

The institution has the flexibility to determine the wording of the statement and the frequency with which it is collected. A **sample** statement is provided below:



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.

SAMPLE

Student Signature _____ Date _____

A student is not eligible to receive a TEOG award if convicted of a felony or an offense under the law in any jurisdiction involving a controlled substance as defined in Chapter 481, Health and Safety Code (Texas Controlled Substances Act), unless he or she meets **all** other eligibility requirements and **one** of the following conditions exists:

- A certificate of discharge by the Texas Department of Criminal Justice or a correctional facility has been issued or the student completed a period of probation ordered by a court, A certificate of discharge by the Texas Department of Criminal Justice or a correctional facility has been issued or the student 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**
- 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.

NOTE: Institutions should consult with their legal counsel concerning questions about individual cases.

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) or completion rate for satisfactory academic progress, or enrollment less than half-time (due to an unforeseen circumstance) 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, upon request.

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 or its equivalent.

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 in the most recent academic year	2.5 cumulative GPA on a 4-point scale or its equivalent

NOTE: 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. If the resulting GPA meets or exceeds the program's academic progress requirement, an otherwise eligible student may receive an award in the following term.

ADDITIONAL INFORMATION

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.

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, unless deemed eligible by the institution under a hardship provision.

AWARDING

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).

Beginning in the 2018-19 award year, the reallocation process was eliminated. Institutions have until the close of business on **August 1** to request grant funding (or the first working day thereafter if it falls on a weekend or holiday). Extending the award year through August allows institutions to award students attending the summer terms, if otherwise eligible. Students may be issued a total of 3 awards (Fall, Spring, and Summer) in an academic year.

TEOG Semester Maximum

Students receiving a TEOG cannot exceed the **semester** maximum for fall, spring, and summer.

- Awards for each semester are still based on the student's enrollment status at census.

TEOG 2019-20 AWARD MAXIMUMS					
INSTITUTION TYPE	AWARD MAXIMUM PER YEAR	SEMESTER MAXIMUM BASED ON ENROLLMENT ON CENSUS DATE			
		FULL-TIME	3/4 TIME	1/2 TIME	< 1/2 TIME
PUBLIC STATE COLLEGES	$8,814	$2,938	$2,204	$1,469	$0
PUBLIC TECHNICAL INSTITUTES	$8,982	$2,994	$2,246	$1,497	$0
PUBLIC COMMUNITY COLLEGES	$4,908	$1,636	$1,227	$ 818	$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 non-loan funds from federal (excluding Pell grants), state, institutional, or outside sources. Funds used for this purpose are frequently referred to as "matching funds".

⚠ **ALERT:** Institutions are required to match funds for all TEOG recipients, regardless if the student is charged 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).

	ENROLLED < 6 HOURS
HARDSHIP PRORATION SCHEDULE	The maximum award for the semester divided by 12, multiplied by the number of hours enrolled.

- 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 = 1-5 hours: 25% of the max award
BALANCE OF ELIGIBLE PROGRAM HOURS	

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 (SFAP) Information Webpage.

Institutions will 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 (See 19 TAC, Section 22.262).

Each biennium, funds not requested in the first year can be carried forward for use in the second year. Any funds not requested in the second year of the biennium become available for redistribution as determined by the THECB.

NOTE: Funding that has been allocated for use in the second year of a biennium cannot be requested in advance during the first year.

DEFINITION: A biennium is the two-year state budget period.

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 semester at ABC Community College and has an extension of eligibility due to an undue hardship circumstance. The prorated award should be calculated as:

- $1,636/12 = $136
- $136 x 5 = $680

The prorated award for Student A = $680

Example Two:

Student B is enrolled in 12 SCHs for the fall 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 = $2,938
- $2,938 x 50% = $1,469

The prorated award for Student B = $1,469

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 SFAP 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 22.265)

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 online inquiry by the deadline listed below through CONTACT US (select the "Financial Aid Question" option in the drop-down selection under Contact Reason). The Financial Aid Services staff will respond to the institution to provide next steps for the process.

TRANSFER FROM:	TRANSFER TO:	AUTHORITY TO TRANSFER REQUEST DEADLINE DATE
TEOG →	TCWS	**JANUARY 18**
OR		
TCWS →	TEOG	**JUNE 14**
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 attending approved private or independent Texas colleges or universities.

STATE PRIORITY DEADLINE (TEC, SECTION 56.008 and 19 TAC, SECTION 22.6)

The THECB provides a uniform priority deadline for applications that qualify for state-funded financial assistance in an academic year. General Academic Teaching Institutions (GATIs) in Texas, as defined in TEC, Section 61.003(3), must publicize and use **January 15** as the 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 and are encouraged to adopt a policy describing the actions that students must take to meet the deadline.

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(15)).

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.

Table of Contents

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 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
  - See SAP section, pg. 22

STOP: Beginning with the 2017-18 academic year, 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)

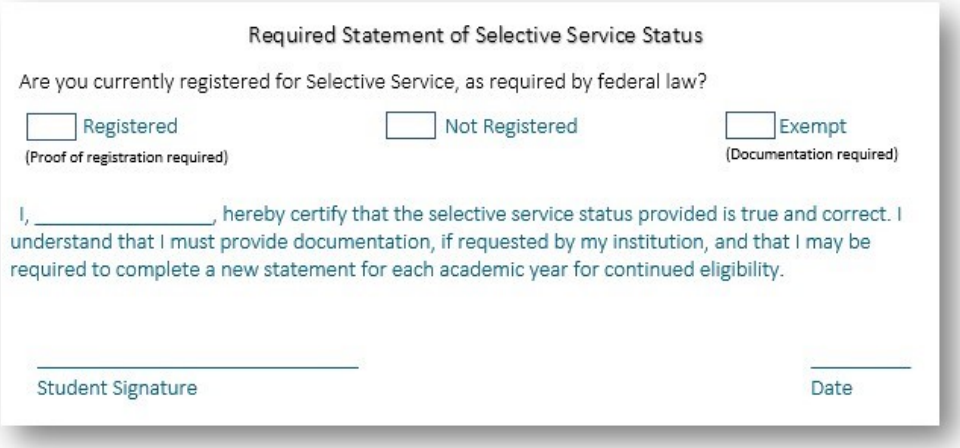
In accordance with TEC, 51.9095, male students may not receive financial assistance without filing a **Selective Service Status Statement** with their institution or other entity granting or guaranteeing the assistance. Financial assistance includes grants, scholarships, loans or other assistance funded by state revenue, including federal funds or gifts and grants accepted by the state.

When is a statement NOT required?

A **Selective Service Status Statement** is not required when a student's registration is confirmed on the Institutional Student Information Record (ISIR). The confirmation on the ISIR will serve as the student's signed statement since the Department of Education validates registration directly with the Selective Service System (SSS) through a database match for male students who complete the Free Application for Federal Student Aid (FAFSA).

When is a statement required?

- For a male student that completes a FAFSA but is flagged "not registered" on the ISIR, the institution must determine the student's status.
  - o If the student is **registered**, the institution must collect the status statement and proof of registration which can be used for subsequent semesters.
  - o If the student is **exempt**, the institution must collect the status statement and proof of exemption based on the student's circumstances. The institution can determine what additional documentation to collect to verify the exemption.
- For a male student that does not complete a FAFSA, the required status 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.



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, and that I may be required to complete a new statement for each academic year for continued eligibility.

_____ Student Signature _____ Date

ADDITIONAL INFORMATION

FREQUENCY COLLECTING THE STATEMENT

If the student's status will NOT change, the statement and supporting documentation can be used for subsequent semesters (e.g., the individual entered the U.S. after the eligible age to register).

In the event the student's status could change, the statement must be collected each academic year until the male student is registered or determined exempt (e.g., student is under 18).

METHOD FOR COLLECTING THE STATEMENT

The institution has discretion to determine how to collect this required status statement, which can be done electronically or on paper (e.g., online form, signed award letter, etc.).

RETENTION SCHEDULE

The status 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 status 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)).

REPROCESSED ISIRS

If the student's most recent ISIR transaction has been reprocessed by the Central Processing System (CPS) and the registration with SSS was confirmed, the institution does not need to collect the status statement or any documentation.

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, or enrollment less than three-quarter time 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, upon request.

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 or its equivalent. 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 or its equivalent.

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

<table>
<tr><th>ACADEMIC YEAR</th><th colspan="3">SAP REQUIREMENTS</th></tr>
<tr><td>END OF 1ST ACADEMIC YEAR</td><td colspan="3">Institutional SAP policy</td></tr>
<tr><td>END OF 2ND ACADEMIC YEAR OR LATER – UNDERGRADUATE STUDENTS</td><td>Completion of at least 24 SCH in the most recent academic year</td><td rowspan="2">75% completion rate</td><td rowspan="2">2.5 cumulative GPA on a 4-point scale or its equivalent</td></tr>
<tr><td>END OF 2ND ACADEMIC YEAR OR LATER – GRADUATE STUDENTS</td><td>Completion of at least 18 SCH in the most recent academic year</td></tr>
</table>

NOTE: A student who does not meet the program 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. If the resulting GPA meets or exceeds the program's academic progress requirement, an otherwise eligible student may receive an award in the following fall term.

ADDITIONAL INFORMATION

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, unless deemed eligible by the institution under a hardship provision.

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

A TEG award amount for a term or semester may not exceed a student's financial need or tuition differential for that term or semester or the program maximum for the academic year, whichever is least. 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 need an undergraduate student has if his or her expected family contribution (EFC) is less than or equal to $1,000 (See 19 TAC, Section 22.22).

Beginning in the 2018-19 award year, the reallocation process was eliminated. Institutions have until the close of business on August 1 to request grant funding (or the first working day thereafter if it falls on a weekend or holiday). Extending the award year through August allows institutions to award students attending the summer terms, if otherwise eligible. Students may be issued a total of 3 awards (Fall, Spring, and Summer) in an academic year.

TEG Annual Maximum

Students receiving a TEG cannot exceed the **annual** maximum.

- A student may receive up to the annual maximum amount of $3,420 (Undergraduates with Exceptional need may receive up to $5,130).
- Total awards for fall, spring and summer terms cannot exceed the annual maximum.
- TEG does NOT have a semester maximum.

TEG 2019-20 AWARD MAXIMUMS		
INSTITUTION TYPE	AWARD MAX/YEAR	EXCEPTIONAL NEED
PRIVATE/INDEPENDENT INSTITUTIONS	$3,420	$5,130
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, regardless of accreditation. The following table shows average resident undergraduate and graduate tuition rates per SCH for public institutions at various SACS levels for the 2019-20 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	$64	n/a
BACCALAUREATE DEGREE LEVEL 2	$58	n/a
MASTER'S DEGREE LEVEL 3	$195	$260
THREE OR FEWER DOCTORAL DEGREES LEVEL 5	$201	$241
FOUR OR MORE DOCTORAL DEGREES LEVEL 6	$248	$294
PUBLIC INSTITUTION RATES FOR LAW SCHOOL STUDENTS = $943 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 EXAMPLE:

- 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 (SFAP) Information Webpage.

Institutions 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 (See 19 TAC, Section 22.29).

Each biennium, funds not requested in the first year can be carried forward for use in the second year. Any funds not requested in the second year of the biennium become available for redistribution as determined by the THECB.

NOTE: Funding that has been allocated for use in the second year of a biennium cannot be requested in advance during the first year.

DEFINITION: A biennium is the two-year state budget period.

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 SFAP 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 22.30)

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 online inquiry by the deadline listed below through CONTACT US (select the "Financial Aid Question" option in the drop-down selection under Contact Reason). The Financial Aid Services staff will respond to the institution to provide next steps for the process.

TRANSFER FROM:	TRANSFER TO:	AUTHORITY TO TRANSFER REQUEST DEADLINE DATE
TEG →	TCWS	**JANUARY 18**
OR		
TCWS →	TEG	**JUNE 14**
Funds can only be transferred from a grant to TCWS or vice versa, never from a grant to a grant.		

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

ELIGIBILITY REQUIREMENTS (19 TAC, SECTION 22.166 & 22.167)

This year the governor, lieutenant governor, state senator or state representative have until **July 31, 2019** to appoint initial TASSP award candidates.

The governor and the lieutenant governor may each appoint two students and two alternates. Each state senator and state representative may appoint one student and one alternate.

TO RECEIVE AN APPOINTMENT, A STUDENT MUST MEET TWO OF THE FOUR CRITERIA:

- ✓ 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 grade point average 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

TO RECEIVE AN INITIAL AWARD, A STUDENT MUST:

- ✓ Be registered with Selective Service, or be exempt
- ✓ 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**
    - A 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

STOP: If a student fails to meet the requirements to initially receive a TASSP award or fails to complete the application process by October 15, the student forfeits the award. THECB will notify the legislative office of their nominee's change in eligibility so the legislator can submit an alternate student (See 19 TAC, Section 22.166(e)).

ADDITIONAL INFORMATION

TASSP APPLICATION PROCESS

- Students can identify a legislator by visiting, Who Represents Me.
- Submit a Texas Armed Services Scholarship Appointment Application to the governor's office, or call (512) 463-1828 .
- To contact the lieutenant governor's office, a student can call (512) 463-0001.

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

LOAN CERTIFICATION

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

2. The financial aid office will certify the student's program eligibility with the THECB.

3. Once the THECB receives the institution's eligibility certification, the student will complete the TASSP application at Loans Online.

APPLICATION DEADLINE

Students must complete their TASSP online application by October 15, 2019.

RENEWAL ELIGIBILITY REQUIREMENTS (19 TAC, SECTION 22.169)

TO RECEIVE A CONTINUATION AWARD, A STUDENT MUST:
✓ Maintain program satisfactory academic progress (SAP), as defined by the THECB ✓ 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 credit hours, including transferred hours, as verified by the student's institution of higher education. STOP: Effective May 2018 (See 19 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

19 TAC, Section 22.169 (f)

REPLACEMENT AWARDS

Students who fail to meet the program eligibility requirements for a continuing award and who have not exhausted all of the eligible scholarships will be replaced. The "replacement" will be eligible for any remaining program scholarships. The total scholarships given to the initial award recipient and the replacement cannot exceed four awards. The THECB will contact the nominating official who initially appointed the award recipient and request a replacement. The appointed replacement will be notified of their award by the THECB and has **60 days** to notify their institution of their eligibility and complete their loan application; otherwise the award will be forfeited.

SATISFACTORY ACADEMIC PROGRESS (SAP) (19 TAC, SECTION 22.169)

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 cumulative semester hours earned includes transfer hours, as verified by the institution.

AWARDING

The TASSP award maximum is determined and announced annually by the THECB. A student cannot receive a TASSP award for more than four of the six years that are allowed for a student to graduate. The award must be reduced by the amount paid to the student for being under contract with one of the branches of the armed services, if the combined total exceeds the student's total cost of attendance (COA) for that academic year (See 19 TAC, Section 22.165).

Institution Type	2019-20 Award Max
Public Institutions	$10,000
Private Institutions	$10,000

SELECTIVE SERVICE STATEMENT (19 TAC, SECTION 22.3)

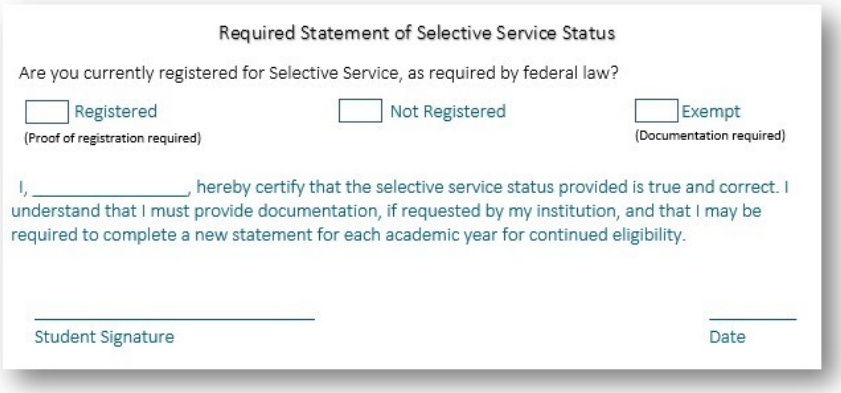
In accordance with TEC, 51.9095, male students may not receive financial assistance without filing a **Selective Service Status Statement** with their institution or other entity granting or guaranteeing the assistance. Financial assistance includes grants, scholarships, loans or other assistance funded by state revenue, including federal funds or gifts and grants accepted by the state.

When is a statement NOT required?

A Selective Service Status Statement is not required when a student's registration is confirmed on the Institutional Student Information Record (ISIR). The confirmation on the ISIR will serve as the student's signed statement since the Department of Education validates registration directly with the Selective Service System (SSS) through a database match for male students who complete the Free Application for Federal Student Aid (FAFSA).

When is a statement required?

- For a male student that completes a FAFSA but is flagged "not registered" on the ISIR, the institution must determine the student's status.
  - o If the student is **registered**, the institution must collect the status statement and proof of registration which can be used for subsequent semesters.
  - o If the student is **exempt**, the institution must collect the status statement and proof of exemption based on the student's circumstances. The institution can determine what additional documentation to collect to verify the exemption.
- For a male student that does not complete a FAFSA, the required status 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.



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, and that I may be required to complete a new statement for each academic year for continued eligibility.

_____ Student Signature _____ Date

ADDITIONAL INFORMATION

FREQUENCY COLLECTING THE STATEMENT

If the student's status will NOT change, the statement and supporting documentation can be used for subsequent semesters (e.g., the individual entered the U.S. after the eligible age to register).

In the event the student's status could change, the statement must be collected each academic year until the male student is registered or determined exempt (e.g., student is under 18).

METHOD FOR COLLECTING THE STATEMENT

The institution has discretion to determine how to collect this required status statement, which can be done electronically or on paper (e.g., online form, signed award letter, etc.).

RETENTION SCHEDULE

The status 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 status 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)).

REPROCESSED ISIRS

If the student's most recent ISIR transaction has been reprocessed by the Central Processing System (CPS) and the registration with SSS was confirmed, the institution does not need to collect the status statement or any documentation.

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PROCESSING FUNDS

CERTIFYING FUNDS

Institutions have until October 1, 2019 to certify TASSP loans. Funds will not be disbursed until the promissory note is signed by the borrower. Financial Aid Administrator can certify TASSAP awards using the following two methods:

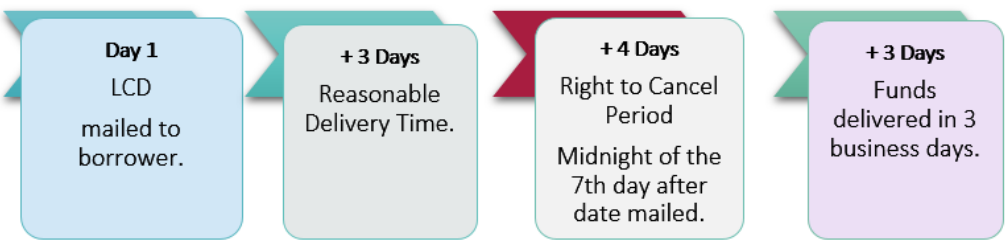
- Certify the loan through the HelmNet loan portal; **OR**
- Submit a **Commonline Loan Certification File** using the MOVEit DMZ secure file transfer portal.

LOAN PROCESS FLOW

Below is the loan process flow that occurs when a borrower completes a TASSP application:

Certification	•Institution submits the certification online or by commonline file transfer
Online Application	•Student completes the online application, submits promissory note and the Private Education Loan Applicant Self Certification form
Private Education Loan Approval Disclosure	•The Private Education Loan Approval Disclosure or "LAD" is mailed to the student with instructions on how to accept the loan terms
Loan Terms Accepted	•Student logs onto HelmNet to electronically complete and acknowledge the Loan Acceptance Disclosure Agreement
Private Education Loan Final Approval Disclosure	•Private Education Loan Final Approval Disclosure or "Loan Consummation Disclosure (LCD)" is mailed to the student informing them of their Right to Cancel and indicating the earliest date for delivery of funds
Funding	•Funds can be scheduled for disbursement after the cancellation period has expired

The earliest a loan can be disbursed is 11 business days after the LCD is mailed to borrower.



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.

REQUESTING LOAN CHANGES

ALERT NEW: REQUIRED CONTACT US INQUIRY INFORMATION

To ensure inquiries are routed correctly, the following steps must be completed:

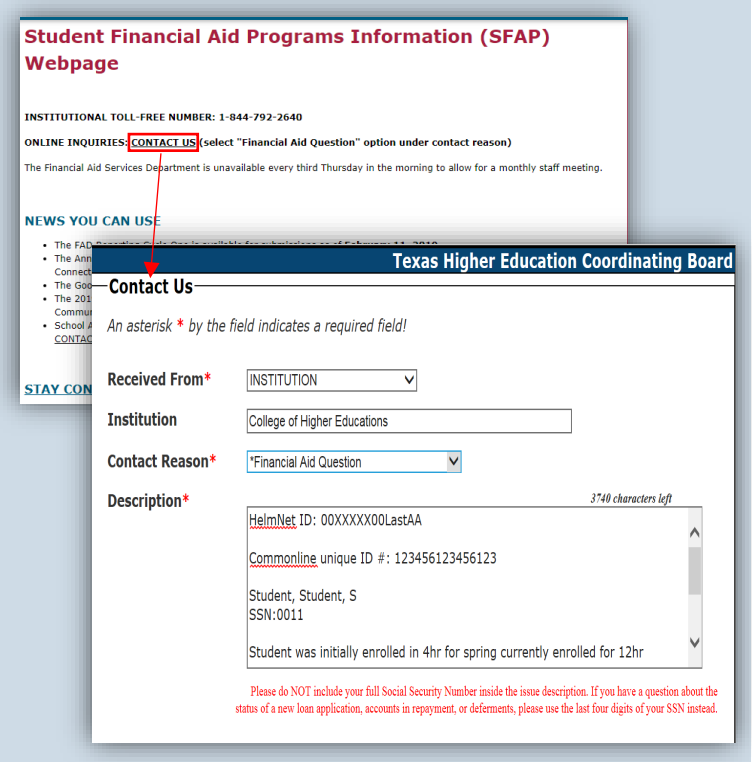
- **Received From:** Select Institution
- **Institution:** Enter the Institution's Full Name
- **Contact Reason:** Select **Financial Aid Question** (regardless of the inquiry reason)

Enter the following information in the Description box:

- HelmNet Loan portal ID
- Commonline Unique ID #: (16 Characters)
- Student's first name, last name, and middle initial
- Last four digits of the student's SSN

Provide a detailed explanation of the change needed:

- **Unclear request:** "Please update the loan disbursement to 04-01-2019".
- **Clear request:** "Please update loan disbursement #1 from 01-15-2019 to 04-01-2019".



REPAYMENT

FORGIVENESS REQUIREMENTS (19 TAC, SECTION 22.170)

A TASSP award is eligible for forgiveness if the student meets the terms of the TASSP agreement and submits a TASSP Annual Certification Form. To qualify for TASSP loan forgiveness, a student must agree to the following terms:

- 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 from college no later than six years after the date first enrolled after receiving a high school diploma or General Educational Diploma (GED) or its equivalent, and
- No later than six months after college graduation, enter into:
  - 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**
  - A 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, the THECB can grant that student additional time to meet the graduation and service requirements specified in the TASSP agreement.

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

If a student fails to meet the TASSP continuation award or forgiveness requirements, the scholarship will be converted to a loan. The student will have a 6-month grace after the scholarship becomes a loan before repayment begins; however, 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 required minimum monthly payment of $100, or an amount required to repay the loan within 15 years, whichever is greater. The TASSP interest rate will be the same rate charged for a College Access Loan at the time the funds were disbursed. If a past due payment amount is not received within 20 days of the scheduled due date, a past due penalty of 5 percent of the scheduled monthly payment or five dollars, whichever is less, will be charged.

Note: 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 by submitting a General Postponement Request.

⚠ **ALERT NEW: ANNUAL STUDENT LOAN DEBT DISCLOSURE (19 TAC, SECTION 21.45)**

All participating institutions must provide students with a letter, in an electronic format, estimating each student's total loan obligations, at least once a year. The purpose of this letter is to provide students with timely information on their education loan debt so they can make informed decisions about student loan borrowing.

Student loan debt disclosures must include:

- All education loan debt from the National Student Loan Data System (NSLDS), as well as information that the institution may reasonably collect from its own records.
- Any estimates of the unpaid amount of state, federal, and other education loans obtained by the student (if reasonably available to the institution); the types of education loans must be identified for each total included.
- *An estimate of the total payoff amount or a range for that amount, including principal and interest.
- *An estimate of monthly repayment amount, including principal and interest.

*At a minimum, institutions shall provide this information based on a 10-year repayment plan.

NOTE: This guidance may change based on recent legislative activity; any necessary updates will be provided accordingly.

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 20 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 Loan 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 Grade Point Average (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

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 20 TAC, Section 22.334).

BOT 2019-20 AWARD MAXIMUMS

INSTITUTION TYPE	AWARD MAX/YEAR	AWARD MAX/SEMESTER
PUBLIC UNIVERSITIES, HRIs AND PRIVATE/INDEPENDENT INSTITUTIONS	$9,792	$4,896
PUBLIC STATE COLLEGES	$5,876	$2,938
PUBLIC TECHNICAL INSTITUTES	$5,988	$2,994
PUBLIC COMMUNITY COLLEGES	$3,272	$1,636
A 3% ORIGINATION FEE WILL BE DEDUCTED FROM THE LOAN PROCEEDS.		

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)

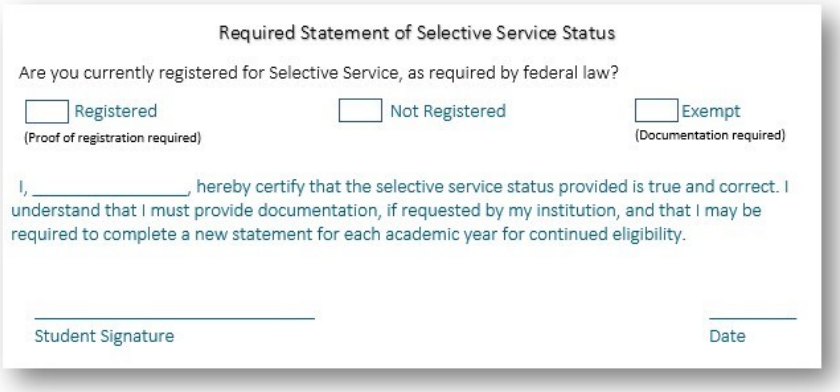
In accordance with TEC, 51.9095, male students may not receive financial assistance without filing a **Selective Service Status Statement** with their institution or other entity granting or guaranteeing the assistance. Financial assistance includes grants, scholarships, loans or other assistance funded by state revenue, including federal funds or gifts and grants accepted by the state.

When is a statement NOT required?

A Selective Service Status Statement is not required when a student's registration is confirmed on the Institutional Student Information Record (ISIR). The confirmation on the ISIR will serve as the student's signed statement since the Department of Education validates registration directly with the Selective Service System (SSS) through a database match for male students who complete the Free Application for Federal Student Aid (FAFSA).

When is a statement required?

- For a male student that completes a FAFSA but is flagged "not registered" on the ISIR, the institution must determine the student's status.
  - o If the student is **registered**, the institution must collect the status statement and proof of registration which can be used for subsequent semesters.
  - o If the student is **exempt**, the institution must collect the status statement and proof of exemption based on the student's circumstances. The institution can determine what additional documentation to collect to verify the exemption.
- For a male student that does not complete a FAFSA, the required status 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.



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, and that I may be required to complete a new statement for each academic year for continued eligibility.

_____ Student Signature _____ Date

ADDITIONAL INFORMATION

FREQUENCY COLLECTING THE STATEMENT

If the student's status will NOT change, the statement and supporting documentation can be used for subsequent semesters (e.g., the individual entered the U.S. after the eligible age to register).

In the event the student's status could change, the statement must be collected each academic year until the male student is registered or determined exempt (e.g., student is under 18).

METHOD FOR COLLECTING THE STATEMENT

The institution has discretion to determine how to collect this required status statement, which can be done electronically or on paper (e.g., online form, signed award letter, etc.).

RETENTION SCHEDULE

The status 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 status 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)).

REPROCESSED ISIRS

If the student's most recent ISIR transaction has been reprocessed by the Central Processing System (CPS) and the registration with SSS was confirmed, the institution does not need to collect the status statement or any documentation.

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 of the hours attempted in the most recent academic year	2.5 cumulative GPA on a 4-point scale

DISCONTINUATION OF ELIGIBILITY (19 TAC, SECTION 22.333)

A student may not receive a BOT 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.

PROCESSING FUNDS

CERTIFYING FUNDS

Funds will not be disbursed until the promissory note is signed by the borrower. Financial Aid Administrators can certify BOT loans 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.

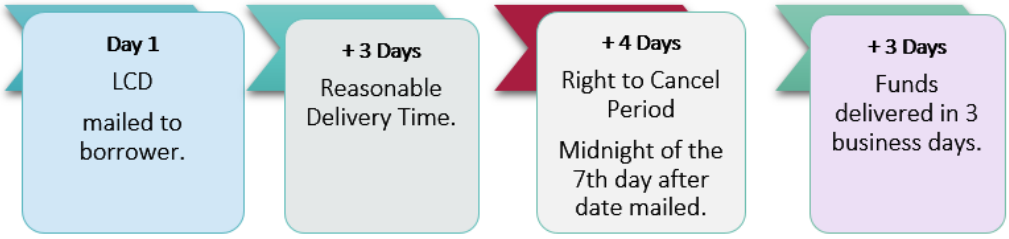
Institutions can begin disbursing loan funds after September 1, 2019 for the 2019-20 academic year.

LOAN PROCESS FLOW

Below is the loan process flow that occurs when a borrower completes a BOT application:

Certification	•Institution submits the certification online or by commonline file transfer
Online Application	•Student completes the online application, submits promissory note and the Private Education Loan Applicant Self Certification form
Private Education Loan Approval Disclosure	•The Private Education Loan Approval Disclosure or "LAD" is mailed to the student with instructions on how to accept the loan terms
Loan Terms Accepted	•Student logs onto HelmNet to electronically complete and acknowledge the Loan Acceptance Disclosure Agreement
Private Education Loan Final Approval Disclosure	•Private Education Loan Final Approval Disclosure or "Loan Consummation Disclosure (LCD)" is mailed to the student informing them of their Right to Cancel and indicating the earliest date for delivery of funds
Funding	•Funds can be scheduled for disbursement after the cancellation period has expired

The earliest a loan can be disbursed is 11 business days after the LCD is mailed to borrower.



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 (SFAP) 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.

REQUESTING LOAN CHANGES

STOP: REINSTATING CANCELED LOANS

Institutions can send a request in writing to reinstate a canceled loan or disbursement through CONTACT US. Requests received more than 60 days after the end of the loan period will not be processed.

Common reasons why loans are canceled by the THECB:

- Student did not approve the Loan Acceptance Disclosure (LAD) within 45 days of loan certification.
- Student was reported by the National Student Clearinghouse (NSC) database as enrolled less than half-time.
- Student contacted the THECB and canceled the loan without informing the institution.

A BOT loan can never exceed the annual maximum amount certified by the institution, but there are several common situations where a BOT loan can be increased. Loan changes can be requested in writing through the CONTACT US link found on the SFAP webpage.

- 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.

ALERT NEW: REQUIRED CONTACT US INQUIRY INFORMATION

To ensure inquiries are routed correctly, the following steps must be completed:

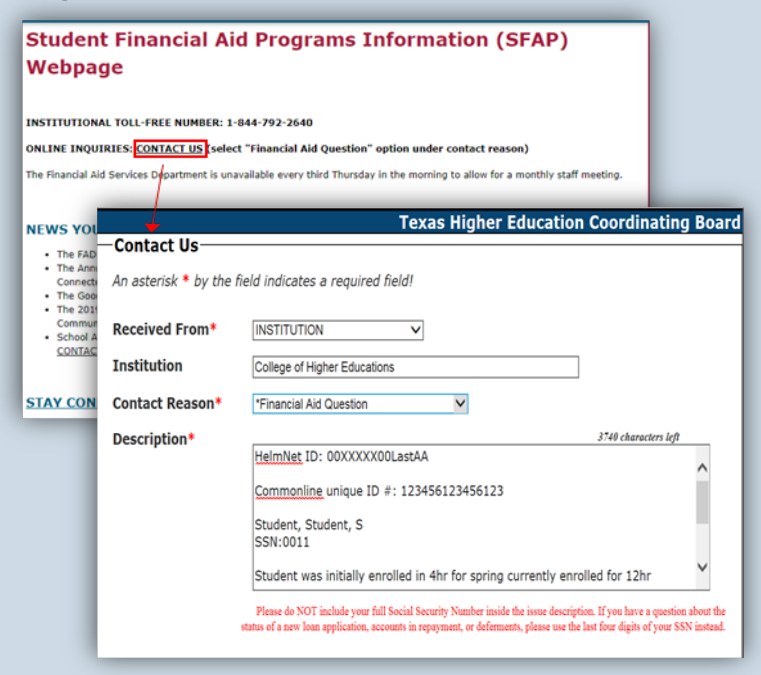
- **Received From:** Select Institution
- **Institution:** Enter the Institution's Full Name
- **Contact Reason:** Select **Financial Aid Question** (regardless of the inquiry reason)

Enter the following information in the Description box:

- HelmNet Loan portal ID
- Commonline Unique ID #: (16 Characters)
- Student's first name, last name, and middle initial
- Last four digits of the student's SSN

Provide a detailed explanation of the change needed:

- **Unclear request:** "Please update the loan disbursement to 04-01-2019".
- **Clear request:** "Please update loan disbursement #1 from 01-15-2019 to 04-01-2019".



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.

⚠ **ALERT NEW: ANNUAL STUDENT LOAN DEBT DISCLOSURE (19 TAC, SECTION 21.45)**

All participating institutions must provide students with a letter, in an electronic format, estimating each student's total loan obligations, at least once a year. The purpose of this letter is to provide students with timely information on their education loan debt so they can make informed decisions about student loan borrowing.

Student loan debt disclosures must include:

- All education loan debt from the National Student Loan Data System (NSLDS), as well as information that the institution may reasonably collect from its own records.
- Any estimates of the unpaid amount of state, federal, and other education loans obtained by the student (if reasonably available to the institution); the types of education loans must be identified for each total included.
- *An estimate of the total payoff amount or a range for that amount, including principal and interest.
- *An estimate of monthly repayment amount, including principal and interest.

*At a minimum, institutions shall provide this information based on a 10-year repayment plan.

NOTE: This guidance may change based on recent legislative activity; any necessary updates will be provided accordingly.

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 with 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 the situation and reason for appealing to:

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

FORGIVENESS DEADLINE

There is no deadline for completing the **Application for Forgiveness**. Submitting the application early will help avoid collection efforts, since BOT Loans are automatically scheduled for repayment six months after a student is no longer enrolled at least half-time or the last date of the student's enrollment.

Enrollment Requirements

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

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 20 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 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)

STUDENTS MUST MEET THE FOLLOWING ELIGIBILITY REQUIREMENTS:	STUDENTS AND COSIGNERS MUST MEET THE FOLLOWING CREDIT APPROVAL REQUIREMENTS:
✓ 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 or higher • A course of study leading to a certificate, an associate, baccalaureate, graduate, or higher degree; **OR** • An approved alternative educator certification program ✓ Be meeting 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	✓ 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 **COSIGNERS MUST:** ✓ 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

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, 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.

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

- Certified prior to May 1, 2019 will carry a fixed annual interest rate of 5.3%.
- Applications certified on or after May 1, 2019 will carry a fixed annual interest rate of 5.2%.
- Beginning January 31, 2019, borrowers who enroll in the Automatic Debit payment service, will receive a 0.25% interest rate reduction on the total interest rate of each applicable loan in repayment.

SELECTIVE SERVICE STATEMENT (19 TAC, SECTION 22.3)

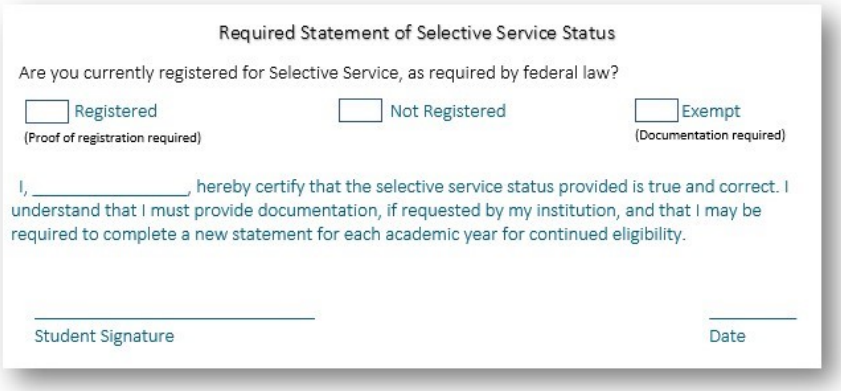
In accordance with TEC, 51.9095, male students may not receive financial assistance without filing a **Selective Service Status Statement** with their institution or other entity granting or guaranteeing the assistance. Financial assistance includes grants, scholarships, loans or other assistance funded by state revenue, including federal funds or gifts and grants accepted by the state.

When is a statement NOT required?

A Selective Service Status Statement is not required when a student's registration is confirmed on the Institutional Student Information Record (ISIR). The confirmation on the ISIR will serve as the student's signed statement since the Department of Education validates registration directly with the Selective Service System (SSS) through a database match for male students who complete the Free Application for Federal Student Aid (FAFSA).

When is a statement required?

- For a male student that completes a FAFSA but is flagged "not registered" on the ISIR, the institution must determine the student's status.
  - o If the student is **registered**, the institution must collect the status statement and proof of registration which can be used for subsequent semesters.
  - o If the student is **exempt**, the institution must collect the status statement and proof of exemption based on the student's circumstances. The institution can determine what additional documentation to collect to verify the exemption.
- For a male student that does not complete a FAFSA, the required status 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.



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, and that I may be required to complete a new statement for each academic year for continued eligibility.

_____ Student Signature _____ Date

ADDITIONAL INFORMATION

FREQUENCY COLLECTING THE STATEMENT

If the student's status will NOT change, the statement and supporting documentation can be used for subsequent semesters (e.g., the individual entered the U.S. after the eligible age to register).

In the event the student's status could change, the statement must be collected each academic year until the male student is registered or determined exempt (e.g., student is under 18).

METHOD FOR COLLECTING THE STATEMENT

The institution has discretion to determine how to collect this required status statement, which can be done electronically or on paper (e.g., online form, signed award letter, etc.).

RETENTION SCHEDULE

The status 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 status 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)).

REPROCESSED ISIRS

If the student's most recent ISIR transaction has been reprocessed by the Central Processing System (CPS) and the registration with SSS was confirmed, the institution does not need to collect the status statement or any documentation.

SATISFACTORY ACADEMIC PROGRESS (SAP) (19 TAC, SECTION 22.46)

A student must be meeting the minimum satisfactory academic progress (SAP) requirements of the institution in the semester any loan is made. 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.

PROCESSING FUNDS

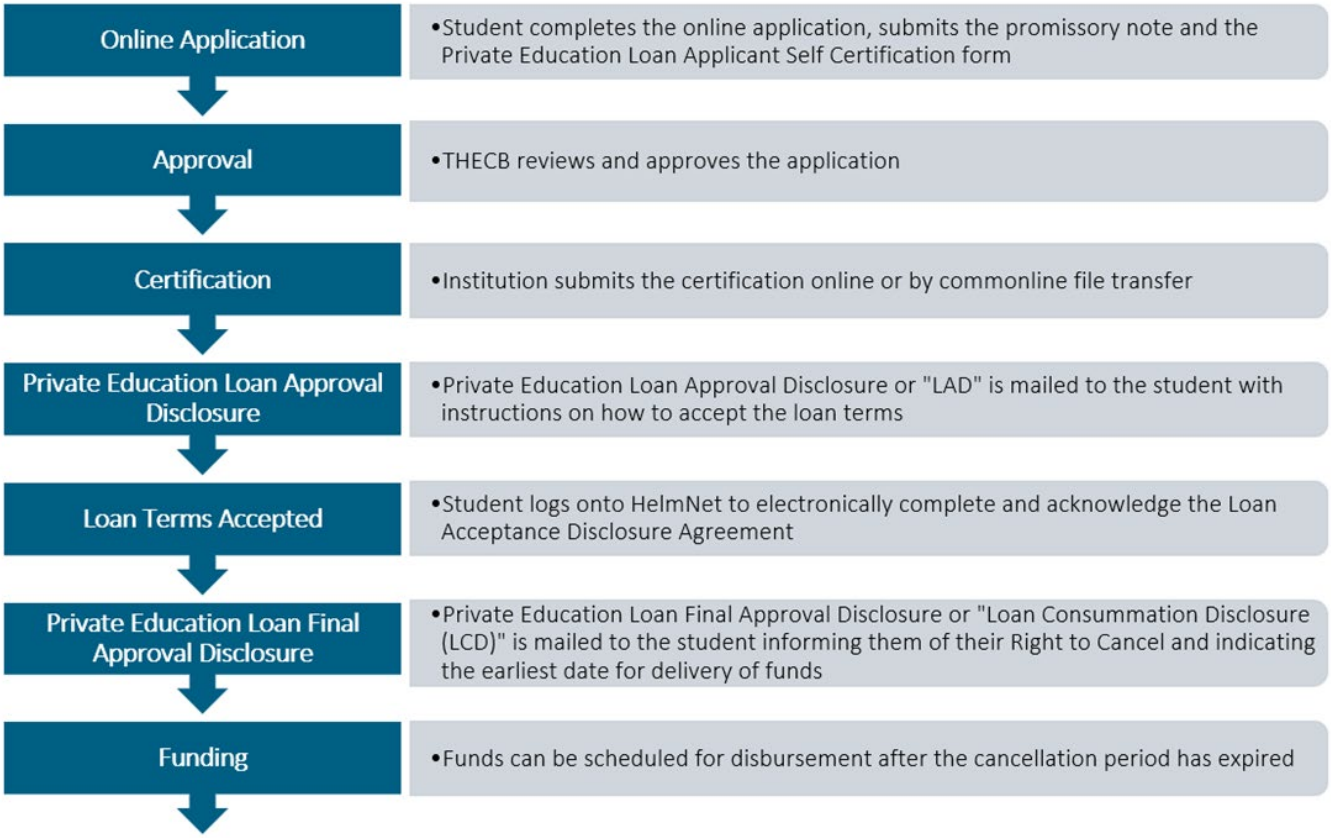
CERTIFYING FUNDS

Institutions can certify eligible 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:

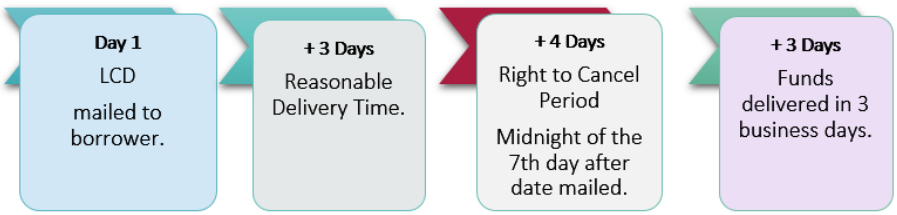
- Certify the loan through the HelmNet loan portal; **OR**
- Submit a **Commonline Loan Certification File** using the MOVEit DMZ secure file transfer portal.

LOAN PROCESS FLOW

Below is the loan process flow that occurs when a borrower completes a CAL application:



The earliest a loan can be disbursed is 11 business days after the LCD is mailed to borrower.



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 (SFAP) 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.

REQUESTING LOAN CHANGES

A CAL can never exceed the amount certified by the institution but there are several common situations where a CAL can be increased. Loan changes can be requested in writing through the CONTACT US link found on the SFAP webpage.

- 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.

STOP: REINSTATING CANCELED LOANS

Institutions can send a request in writing to reinstate a canceled loan or disbursement through CONTACT US. Requests received more than 60 days after the end of the loan period will not be processed.

Common reasons why loans are canceled by the THECB:

- Student did not approve the Loan Acceptance Disclosure (LAD) within 45 days of loan certification.
- Student was reported by the National Student Clearinghouse (NSC) database as enrolled less than half time.
- Student contacted the THECB and canceled the loan without informing the institution.

REQUESTING LOAN CHANGES CONTINUED

⚠ ALERT NEW: REQUIRED CONTACT US INQUIRY INFORMATION

To ensure inquiries are routed correctly, the following steps must be completed:

- Select Institution
- Enter the Institution's Full Name
- Select **Financial Aid Question** (regardless of the inquiry reason)

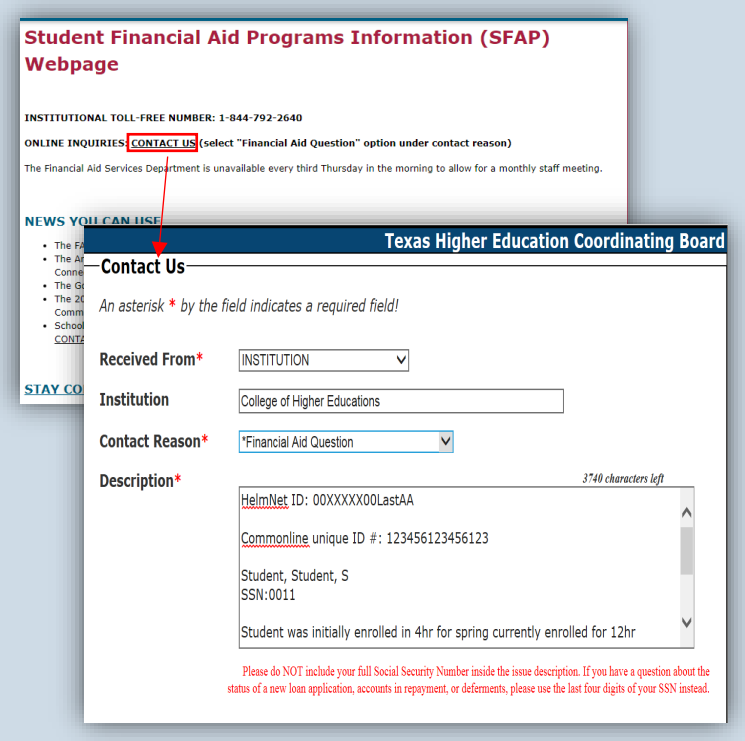
Enter the following information in the Description box:

- HelmNet Loan portal ID
- Commonline Unique ID #: (16 Characters)
- Student's first name, last name, and middle initial
- Last four digits of the student's SSN

Provide a detailed explanation of the change needed:

Give as many details pertaining to your request as possible, for example:

- **Unclear request:** "Please update the loan disbursement to 04-01-2019".
- **Clear request:** "Please update loan disbursement #1 from 01-15-2019 to 04-01-2019".



REPAYMENT

The CAL has 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.

⚠ ALERT NEW: ANNUAL STUDENT LOAN DEBT DISCLOSURE (19 TAC, SECTION 21.45)

All participating institutions must provide students with a letter, in an electronic format, estimating each student's total loan obligations, at least once a year. The purpose of this letter is to provide students with timely information on their education loan debt so they can make informed decisions about student loan borrowing.

Student loan debt disclosures must include:

- All education loan debt from the National Student Loan Data System (NSLDS), as well as information that the institution may reasonably collect from its own records.
- Any estimates of the unpaid amount of state, federal, and other education loans obtained by the student (if reasonably available to the institution); the types of education loans must be identified for each total included.
- *An estimate of the total payoff amount or a range for that amount, including principal and interest
- *An estimate of monthly repayment amount, including principal and interest.

*At a minimum, institutions shall provide this information based on a 10-year repayment plan.

NOTE: This guidance may change based on recent legislative activity, any necessary updates will be provided accordingly.

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
  - Special Education
  - Mathematics
  - Computer Science
  - Career and Technical Education
- ✓ Certified by TEA as an Educational Aide I,II,III.

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

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)

ADDITIONAL INFORMATION

GRADUATE STUDENT ELIGIBILITY

Students enrolled in graduate courses leading to teacher certification in a teacher shortage area are eligible for the EAE.

FINANCIAL NEED

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).

An eligible applicant 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), provided the applicant has the required educational aide work experience. Awarded students must remain employed for the full term.

SELECTIVE SERVICE STATEMENT (19 TAC, SECTION 22.3)

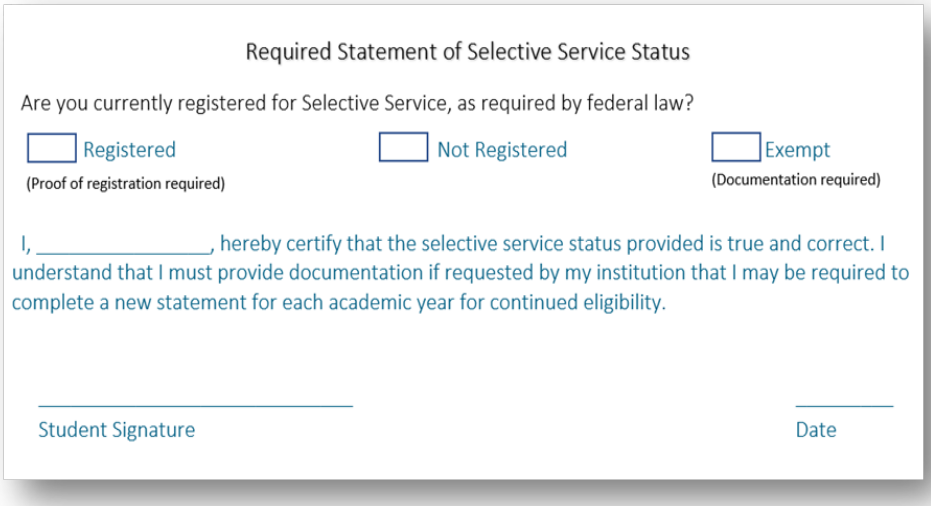
In accordance with TEC, 51.9095, male students may not receive financial assistance without filing a **Selective Service Status Statement** with their institution or other entity granting or guaranteeing the assistance. Financial assistance includes grants, scholarships, loans or other assistance funded by state revenue, including federal funds or gifts and grants accepted by the state.

When is a statement NOT required?

A **Selective Service Status Statement** is not required when a student's registration is confirmed on the Institutional Student Information Record (ISIR). The confirmation on the ISIR will serve as the student's signed statement since the Department of Education validates registration directly with the Selective Service System (SSS) through a database match for male students who complete the Free Application for Federal Student Aid (FAFSA).

When is a statement required?

- For a male student that completes a FAFSA but is flagged "not registered" on the ISIR, the institution must determine the student's status.
  - o If the student is **registered**, the institution must collect the status statement and proof of registration which can be used for subsequent semesters.
  - o If the student is **exempt**, the institution must collect the status statement and proof of exemption based on the student's circumstances. The institution can determine what additional documentation to collect to verify the exemption.
- For a male student that does not complete a FAFSA, the required status 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.



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

ADDITIONAL INFORMATION

FREQUENCY COLLECTING THE STATEMENT

If the student's status will NOT change, the statement and supporting documentation can be used for subsequent semesters (e.g., the individual entered the U.S. after the eligible age to register).

In the event the student's status could change, the statement must be collected each academic year until the male student is registered or determined exempt (e.g., student is under 18).

METHOD FOR COLLECTING THE STATEMENT

The institution has discretion to determine how to collect this required status statement, which can be done electronically or on paper (e.g., online form, signed award letter, etc.).

RETENTION SCHEDULE

The status 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 status 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)).

REPROCESSED ISIRS

If the student's most recent ISIR transaction has been reprocessed by the Central Processing System (CPS) and the registration with SSS was confirmed, the institution does not need to collect the status statement or any documentation.

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

Students receiving awards through the EAE 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)).

STOP: An EAE award can only be applied to courses for which an institution receives formula funding.

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.

PROCESSING FUNDS

REQUESTING PROGRAM FUNDS

Institutions can request funds from **August 1, 2019** through **August 1, 2020**. 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**.

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**.

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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)

The THECB provides a uniform priority deadline for applications that qualify for state-funded financial assistance in an academic year. General Academic Teaching Institutions (GATIs) in Texas, as defined in TEC, Section 61.003(3), must publicize and use January 15 as the 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 and are encouraged to adopt a policy describing the actions that students must take to meet the deadline.

ELIGIBLE INSTITUTIONS (19 TAC, SECTION 22.129)

Any public, private, or independent institution of higher education as defined in TEC, Section 61.003, except a theological or religious seminary institutions, is eligible to participate in the TCWS Program.

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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

NON-RESIDENT STUDENTS

Nonresident students are not eligible to receive TCWS even if they are eligible to pay resident tuition.

An affidavit student 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.

HOURS OF EMPLOYMENT

TCWS Program participants can only work **part-time**. Hours worked may vary according to a student's TCWS award amount and the employer's definition of a part-time employee (see TEC, Section 56.076(1)).

SELECTIVE SERVICE STATEMENT (19 TAC, SECTION 22.3)

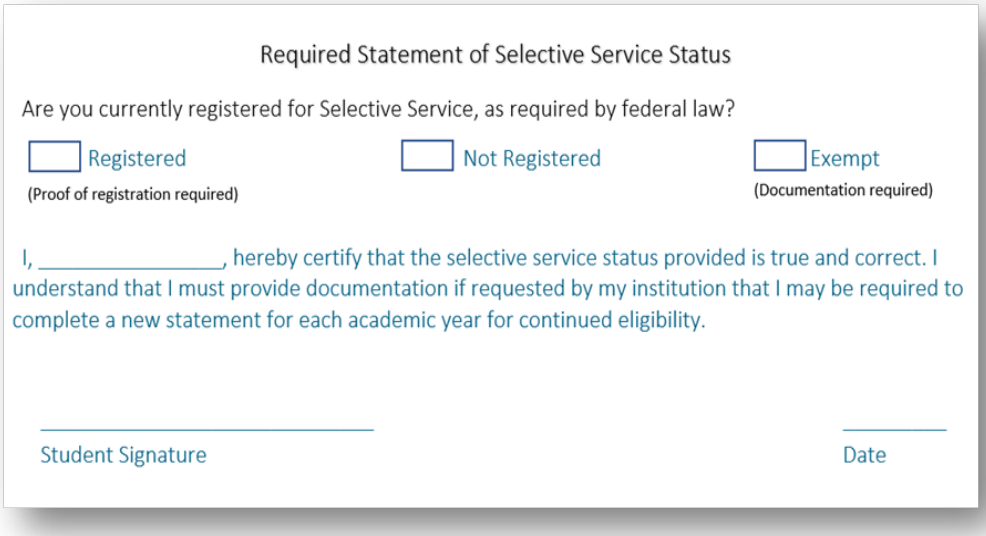
In accordance with TEC, 51.9095, male students may not receive financial assistance without filing a **Selective Service Status Statement** with their institution or other entity granting or guaranteeing the assistance. Financial assistance includes grants, scholarships, loans or other assistance funded by state revenue, including federal funds or gifts and grants accepted by the state.

When is a statement NOT required?

A **Selective Service Status Statement** is not required when a student's registration is confirmed on the Institutional Student Information Record (ISIR). The confirmation on the ISIR will serve as the student's signed statement since the Department of Education validates registration directly with the Selective Service System (SSS) through a database match for male students who complete the Free Application for Federal Student Aid (FAFSA).

When is a statement required?

- For a male student that completes a FAFSA but is flagged "not registered" on the ISIR, the institution must determine the student's status.
  - o If the student is **registered**, the institution must collect the status statement and proof of registration which can be used for subsequent semesters.
  - o If the student is **exempt**, the institution must collect the status statement and proof of exemption based on the student's circumstances. The institution can determine what additional documentation to collect to verify the exemption.
- For a male student that does not complete a FAFSA, the required status 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.



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

ADDITIONAL INFORMATION

FREQUENCY COLLECTING THE STATEMENT

If the student's status will NOT change, the statement and supporting documentation can be used for subsequent semesters (e.g., the individual entered the U.S. after the eligible age to register).

In the event the student's status could change, the statement must be collected each academic year until the male student is registered or determined exempt (e.g., student is under 18).

METHOD FOR COLLECTING THE STATEMENT

The institution has discretion to determine how to collect this required status statement, which can be done electronically or on paper (e.g., online form, signed award letter, etc.).

RETENTION SCHEDULE

The status 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 status 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)).

REPROCESSED ISIRS

If the student's most recent ISIR transaction has been reprocessed by the Central Processing System (CPS) and the registration with SSS was confirmed, the institution does not need to collect the status statement or any documentation.

AWARDING

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

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 19TAC, Section 22.131).

🔍 **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.

10 Total Positions X 20% = 2 Off-Campus Positions - Minimum
10 Total Positions X 50% = 5 Off-Campus Positions - Maximum

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 are required to utilize the original state work-study allocation of funds for employment during the nine-month academic year (fall and spring terms). Institutions may use **reallocated** funds for summer awards. Funds for summer awards must be expended 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 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)

Institutions participating in a 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 online inquiry by the deadline listed below through CONTACT US (select the "Financial Aid Question" option in the drop-down selection under Contact Reason). The Financial Aid Services staff will respond to the institution to provide next steps for the process.

TRANSFER FROM:	TRANSFER TO:	AUTHORITY TO TRANSFER REQUEST DEADLINE DATE
TEXAS Grant TEOG TEG →	TCWS	JANUARY 18
OR		
TCWS →	TEXAS Grant TEOG TEG	JUNE 14
Funds can only be transferred from a grant to TCWS or vice versa, never from a grant to a grant.		

WORK-STUDY STUDENT MENTORSHIP PROGRAM

The Texas Higher Education Coordinating Board (THECB) Work-Study Student Mentorship Program (WSMP) 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 & PURPOSE (TEC, SECTION 56.079 AND 19 TAC, SECTION 4.191)

The Work-Study Student Mentorship Program (WSMP) is authorized by TEC Chapter 56, Subchapter E, Section 56.079. Rules establishing procedures to administer the program can be found in Title 19 of the TAC, Chapter 4, Subchapter J. The purpose of the mentorship program is to provide employment to eligible students with financial need to mentor, tutor, or advise college students at participating institutions of higher education or high school students within local school districts and nonprofit organizations. The primary goal of the program is to improve student access, success, and completion of higher education. These student mentorship positions are funded by a combination of state appropriations provided by the Texas College Work-Study (TCWS) Program and matching funds from participating institutions.

STATE PRIORITY DEADLINE (TEC, SECTION 56.008 AND 19 TAC, SECTION 22.6)

The THECB provides a uniform priority deadline for applications that qualify for state-funded financial assistance in an academic year. General Academic Teaching Institutions (GATIs) in Texas, as defined in TEC, Section 61.003(3), must publicize and use **January 15** as the 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 and are encouraged to adopt a policy describing the actions that students must take to meet the deadline.

ELIGIBLE INSTITUTIONS (19 TAC, SECTION 4.194)

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 WSMP.

PARTICIPATION REQUIREMENTS

INSTITUTION REQUIREMENTS (19 TAC, SECTION 4.194)

To participate, an eligible institution must establish a Work-Study Student Mentorship Program designed to improve student access, success, and completion of higher education. Programs must be structured to offer on-campus or off-campus mentoring, tutoring, or advising services. Institutions implementing programs **on-campus** should make every effort to incorporate services to underrepresented students.

Institutions that implement an **off-campus** program to serve local high school students must partner with school districts and nonprofit organizations through a Memorandum of Understanding (MOU). The MOU agreement details the roles and responsibilities of each participating entity and must be in place prior to program implementation. The institution must provide a copy of the MOU to the THECB. (See Sample MOU.)

Each Work-Study Student Mentorship Program must provide the following:

- Part-time employment to eligible students as mentors, tutors, or advisors
  - Salary requirements:
    - Minimum of $10 an hour
    - Maximum of 20 hours per week
- Training as determined by the THECB
- Program oversight

MENTOR TRAINING REQUIREMENTS

Participating institutions must ensure that WSMP award recipients receive training that covers the following topics:

- Overview of *60x30TX* Strategic Plan and the role the recipient will play to help meet the goals and objectives of the plan.
- Overview of general knowledge around college access and completion.
- Personal, public, economic, and societal benefits of higher education.
- Specific information about applying to college, including college exploration, the admission process, authoring personal essays, completing the financial aid process, and submitting college application form

WSMP ACTIVITY EXAMPLES

- Provide information to high school students about higher education, including the college selection process, the application process, and financial aid options.
- Assist students in finding and using appropriate resources, such as the College for All Texans website.
- Assist students in completing the Free Application for Federal Student Aid (FAFSA), ApplyTexas application, or other college applications.
- Assist in special outreach events, such as College Nights or FAFSA Saturdays.
- Assist college students with academic tutoring or mentoring.
- Assist with student interventions focused on increasing completion of degrees or certificates, such as interventions occurring through peer advising or supplemental instruction.
- Establish a student and parent outreach center through community partnerships and provide tools and information to help families make decisions about going to college.

ELIGIBILITY

ELIGIBILITY REQUIREMENTS (19 TAC, SECTION 4.194) AND (19 TAC, SECTION 22.130)

TO RECEIVE A WSMP 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 at the participating institution, 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 the student is awarded WSMP funds
- ✓ 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

SELECTIVE SERVICE STATEMENT (19 TAC, SECTION 22.3)

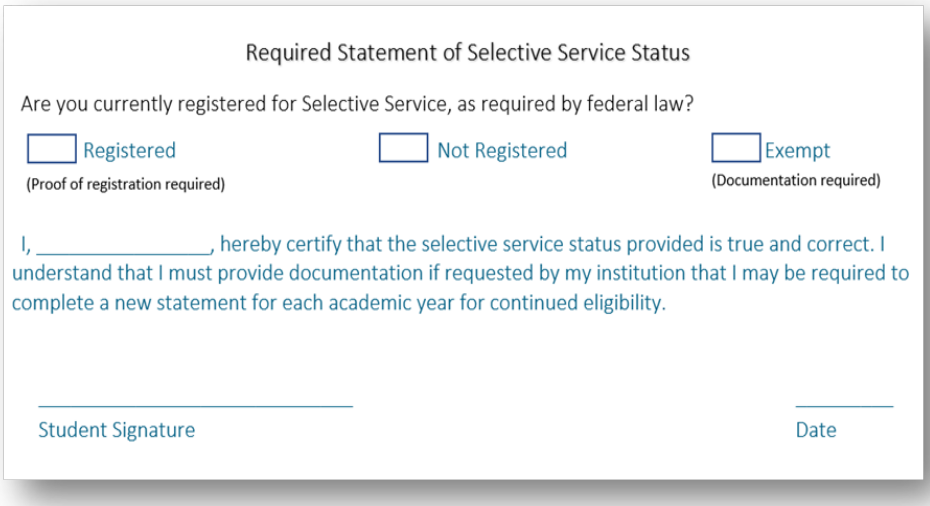
In accordance with TEC, 51.9095, male students may not receive financial assistance without filing a **Selective Service Status Statement** with their institution or other entity granting or guaranteeing the assistance. Financial assistance includes grants, scholarships, loans, or other assistance funded by state revenue, including federal funds or gifts and grants accepted by the state.

When is a statement NOT required?

A Selective Service Status Statement is not required when a student's registration is confirmed on the Institutional Student Information Record (ISIR). The confirmation on the ISIR will serve as the student's signed statement since the Department of Education validates registration directly with the Selective Service System (SSS) through a database match for male students who complete the Free Application for Federal Student Aid (FAFSA).

When is a statement required?

- For a male student that completes a FAFSA but is flagged "not registered" on the ISIR, the institution must determine the student's status.
  - o If the student is **registered**, the institution must collect the status statement and proof of registration, which can be used for subsequent semesters.
  - o If the student is **exempt**, the institution must collect the status statement and proof of exemption based on the student's circumstances. The institution can determine what additional documentation to collect to verify the exemption.
- For a male student that does not complete a FAFSA, the required status 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.



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

ADDITIONAL INFORMATION

FREQUENCY COLLECTING THE STATEMENT

If the student's status will NOT change, the statement and supporting documentation can be used for subsequent semesters (e.g., the individual entered the U.S. after the eligible age to register).

In the event the student's status could change, the statement must be collected each academic year until the male student is registered or determined exempt (e.g., student is under 18).

METHOD FOR COLLECTING THE STATEMENT

The institution has discretion to determine how to collect this required status statement, which can be done electronically or on paper (e.g., online form, signed award letter, etc.).

RETENTION SCHEDULE

The status 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 status statement collected must be retained with the student's records for 7 years after the date of completion for the applicable award period (TAC, Section 22.4(a)(2)(A)).

REPROCESSED ISIRS

If the student's most recent ISIR transaction has been reprocessed by the Central Processing System (CPS) and the registration with SSS was confirmed, the institution does not need to collect the status statement or any documentation.

AWARDING

In determining who should receive a WSMP award, a student's financial need must be calculated.

CALCULATING AWARD AMOUNTS

STOP: Funds awarded to the employed student are considered financial aid for the academic year in which the funds are earned and therefore cannot exceed the student's **financial need**.

Financial Need is defined as the cost of attendance (COA) minus the expected family contribution (EFC).

Example 1:

10,000 (COA) – 3,000 (EFC) = $7,000 (Financial Need)

In this example, the student has financial need and may be eligible for a WSMP award of up to $7,000 for the academic year.

Example 2:

10,000 (COA) – 15,000 (EFC) = -$5,000 (No Financial Need)

In this example, the student has no financial need and is not eligible for a WSMP award for the academic year.

REQUIRED MATCHING (TEC, SECTION 56.079)

Participating institutions must provide at least a 10% match of total employed student wages. In addition, institutions are required to fund 100% of a student's employee benefits. Institutional funds for the match and employee benefits must come from sources other than federal college work-study.

Institutions that are **eligible for Title III funds** from the U.S. Department of Education **are exempt** from the WSMP requirement of providing a minimum 10% match of a WSMP-employed student's total wages. To qualify for this exemption, institutions must submit a current copy of the Title III eligibility letter to the THECB.

STOP: To ensure compliance with program requirements, the THECB will conduct desk reviews and site visits. For information regarding records and retention, please refer to section 4.13 within the signed MOUs.

PROCESSING FUNDS

ALLOCATIONS (19 TAC, SECTION 4.195)

At the start of the fiscal year, each participating institution's full allocation of funds for WSMP will be disbursed. Funds designated for public universities, health-related institutions (HRIs), and technical institutes 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 fiduciary institution, via Electronic Funds Transfer (EFT).

WSMP funds may be issued to eligible students throughout the academic year, including summer. Funds may be used only for the salaries and fringe benefits of eligible student mentors, tutors, or advisors. Each biennium, funds not expended by the institution in the first year can be carried forward for use in the second year. Any funds not expended in the second year of the biennium must be returned to the THECB. Although the WSMP has carry forward authority, every effort should be made to expend funds within the same year that the funds are disbursed to the institution.

Example: Carry Forward During the 2020-2021 Biennium

FY 2020

- State Fiscal Year begins September 1, 2019 and ends August 31, 2020
- Unexpended FY 2020 funds can be *carried forward* into FY 2021

FY 2021

- State Fiscal Year begins September 1, 2020 and ends August 31, 2021
- All funds for the biennium (including any *carry-forward* funds from FY 2020) must be expended by August 31, 2021

Note: *A biennium is defined as a two-year state budget period.*

REPORTING

REPORTING REQUIREMENTS (19 TAC, SECTION 4.196)

Participating institutions must report to the THECB the progress made by students being assisted through the WSMP. To comply with the Family Educational Rights and Privacy Act (FERPA), participating institutions must have authority to gather, review, and report to the THECB appropriate data from all partners for evaluation purposes. Reports will be submitted through a secure online portal. Failure to meet the program reporting requirements may result in the loss of funding.

To meet the reporting requirements, institutions must submit a **Financial Expenditure Report** and a **Data Report** that collects aggregate information. Samples of the report templates are provided on the Quick Reference page under Available Forms. The Data Report template includes a Program Overview tab and an Activity Summary and Persistence Data tab within the spreadsheet.

Persistence Data includes each of the following:

- Number of students employed as mentors, tutors, or advisors in the preceding year.
- Number of college students from the participating institution receiving mentoring, tutoring, or advising in the preceding year.
- Number of high school students receiving mentoring, tutoring, or advising from students of the participating institution in the preceding year.
- Information relating to the costs of the program.
- The academic progress made by each of the following in the preceding year:
    - Students of the participating institution receiving mentoring, tutoring, or advising
    - High school students receiving mentoring, tutoring, or advising from students of the participating institution

The table below shows the due dates for the required reports. If the due date falls on a holiday or a weekend, reports are due on the following business day.

Financial Expenditure Report and Aggregate Data Report		
Report	**Reporting Period**	**Due Date**

• **Financial Expenditure Report**
• **Data Report**
  ○ **Program Overview**
  ○ **Activity Summaries**
	September 1 - December 31, 2019	**January 5, 2020**

Financial Expenditure Report	September 1 - May 31, 2020	**June 5, 2020**

• **Financial Expenditure Report**
• **Data Report**
  ○ **Program Overview**
  ○ **Activity Summaries**
  ○ **Persistence Data**
	September 1 - August 31, 2020	**September 5, 2020**

STOP: The data submitted on the **Financial Expenditure Report** will be used to reconcile totals submitted to the THECB on the **Financial Aid Database (FAD)**. To ensure data are reported accurately, program directors should reconcile expenditures with the campus financial aid office.

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APPENDIX 1: SACS PROGRAM LEVELS

Institution Name	SACS Level	UNDERGRADUATE TUITION RATE PER SCH	GRADUATE TUITION RATE PER SCH
Abilene Christian University	5	$201	$241
Austin College	3	$195	$260
Baylor University	6	$248	$294
Concordia University Texas	5	$201	$241
Dallas Baptist University	5	$201	$241
East Texas Baptist University	3	$195	$260
Hardin-Simmons University	5	$201	$241
Houston Baptist University	5	$201	$241
Howard Payne University	3	$195	$260
Huston-Tillotson University	3	$195	$260
Jacksonville College	1	$64	n/a
Jarvis Christian College	2	$58	n/a
LeTourneau University	3	$195	$260
Lubbock Christian University	3	$195	$260
McMurry University	3	$195	$260
Our Lady of the Lake University	5	$201	$241
Parker University	5	$201	$241
Paul Quinn College	2	$58	n/a
Rice University	6	$248	$294
Schreiner University	3	$195	$260
Southern Methodist University	6	$248	$294
Southwestern Adventist University	3	$195	$260
Southwestern Assemblies of God University	5	$201	$241
Southwestern Christian College	2	$58	n/a
Southwestern University	2	$58	n/a
St. Edward's University	3	$195	$260
St. Mary's University	5	$201	$241
Texas Chiropractic College	5	$201	$241
Texas Christian University	6	$248	$294
Texas College	2	$58	n/a
Texas Lutheran University	3	$195	$260
Texas Wesleyan University	6	$248	$294
The University of Dallas	5	$201	$241
Trinity University	3	$195	$260
University of Mary Hardin-Baylor	5	$201	$241
University of St. Thomas	5	$201	$241
University of the Incarnate Word	6	$248	$294
Wayland Baptist University	5	$201	$241
Wiley College	2	$58	n/a

For example: Institution Current Tuition Rate per SCH = $550
Institution SACS Level = 3

To calculate tuition differential for an undergraduate student who enrolled in 12 SCH in the fall and 12 SCH in the spring, the institution would report the following:

$550	–	$195	=	$355	x	24 SCH	=	$8,520
Institution Current Tuition	–	SACS Avg.	=	Difference	x	Semester Credit Hours	=	Tuition Diff.

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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
AVAILABLE FORMS	
TEXAS Grant, TEOG, TEG, TCWS	Authority to Transfer
State grant funds must be requested using the Grant Payment System through the CBPass portal.	Grant Payment System Portal
A form is required when requesting funds for the Bilingual Education Scholarship Program.	Bilingual Education Scholarship Funds Request Form
A form is required when requesting funds for the Educational Aide Exemption Program.	Educational Aide Exemption Funds Request Form
Directors of Financial Aid must submit a form to add, update or remove a user's access to state financial aid web portals through the THECB.	System Authorization 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	
WORK-STUDY STUDENT MENTORSHIP PROGRAM (WSMP)	
For questions concerning the WSMP, contact:	Vanessa Malo, Program Specialist Phone: (512) 427-6267 Email: Vanessa.Malo@THECB.state.tx.us
Work-Study Student Mentorship Webpage	WSMP Webpage
Financial Expenditure Report Template	
Data Report Template	
Sample MOU	
Refund Instructions	