

State Financial Aid Monthly Webcast

March 1, 2023

Topics of Discussion



Online TASFA
Updates

FORWARD Loan
Program

FAD
Data Submission
Portal

Notifications and
Deadlines

Questions?

Online TASFA

Updates

Online TASFA Update



2023-2024 Online TASFA

- Scheduled to open in Spring 2023.
- Low volume of TASFA submissions is expected since many students already completed paper version.
- Training on the application and file transmission process will be provided prior to opening the TASFA.
- Test files are still being tested by the THECB.
- Updated File Layout document will be sent in March.

Data File Transmission

TASFA files will be sent to institutions through a secure file transfer protocol (SFTP) using the THECB's online portal, [MOVEit DMZ](#). Each institution will have a dedicated **TASFA_Output** folder.

The screenshot shows the MOVEit DMZ interface. At the top, there is a search bar labeled 'Find:' and a dashed box for file uploads with the text 'Drop files to upload.' and an 'Upload Files' button. Below this is a table of files and folders. The 'TASFA_Output' folder is highlighted with a red box. Below the table, there are buttons for 'Delete', 'Download', 'Enter destination folder', 'Copy', 'Move', and 'Advanced Copy/Move Options'.

<input type="checkbox"/>	Name	Size/Contents	Creator	Created	Actions
<input type="checkbox"/>	Parent Folder				
<input type="checkbox"/>	NetPriceCalc			3/4/2021 9:51:16 AM	
<input type="checkbox"/>	Grant_Output	4 1		5/3/2016 7:18:28 PM	
<input type="checkbox"/>	FADS_Output	361		5/3/2016 7:18:11 PM	
<input type="checkbox"/>	Loans_Output	2246		4/29/2016 2:49:41 PM	
<input type="checkbox"/>	TASFA_Output	361		10/1/2022 9:00:00 PM	

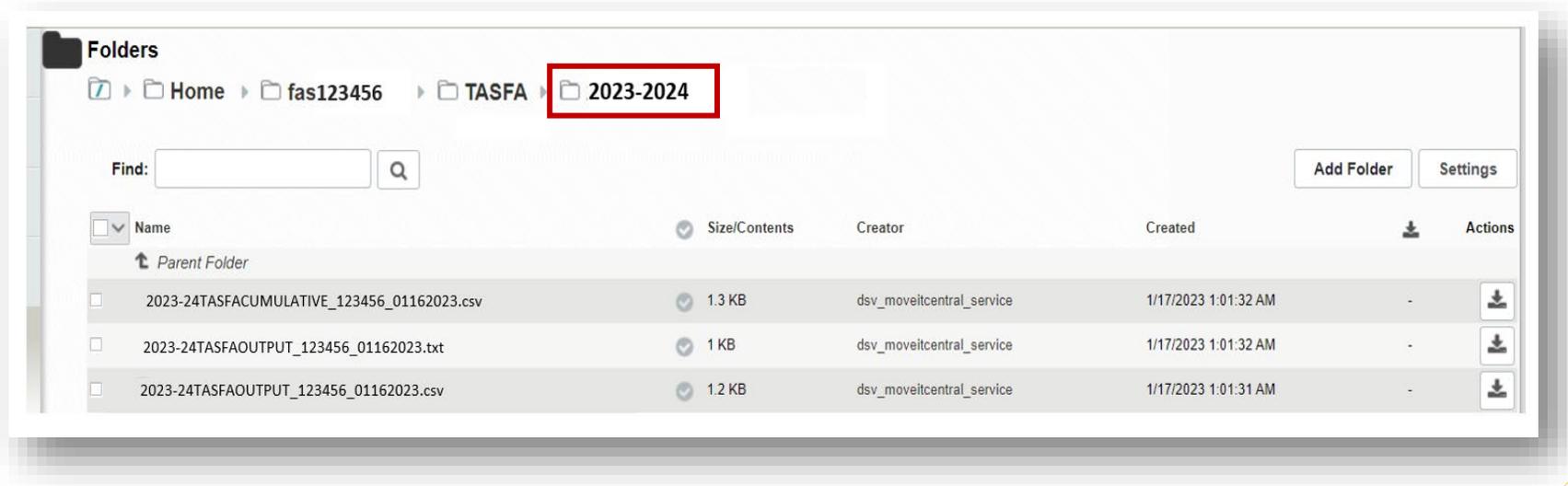
Selected File/Folder Actions:

Delete Download

Enter destination folder Copy Move Advanced Copy/Move Options

Data File Transmission

Files will be uploaded into TASFA_Output folder under the applicable award year using a batch process by the THECB.



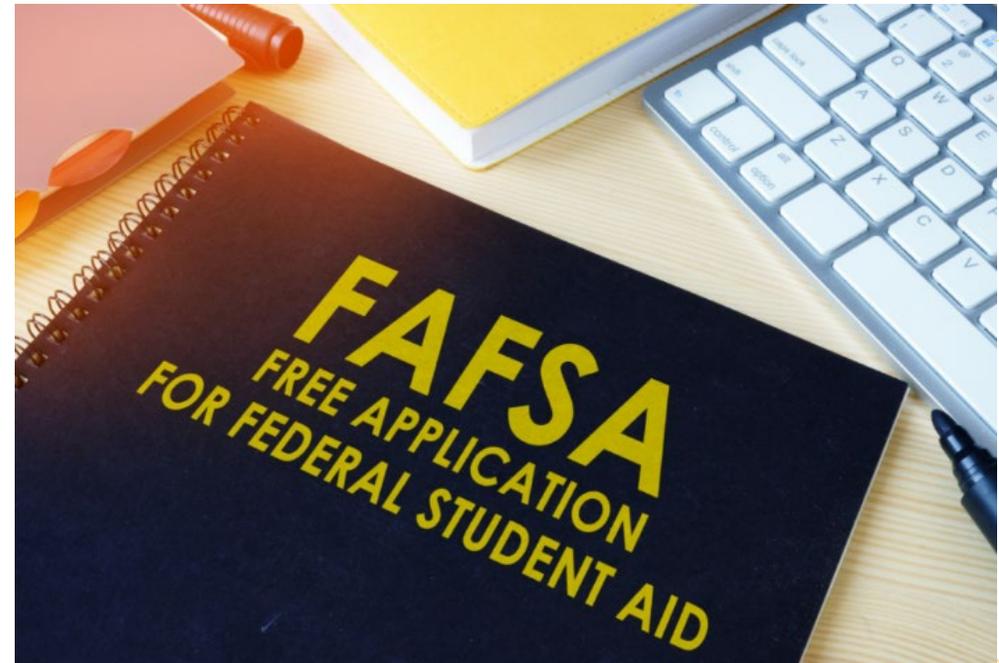
- Daily cumulative report (per award year) – CSV format
- TASFA Submission File – Fixed-Length Text File format
- TASFA Submission Files – CSV format

FAFSA Simplification

Impacts on TASFA

2024-25 TASFA

- The paper TASFA (English and Spanish) will incorporate FAFSA changes once Department of Education releases them in 2023.
- A 2024-25 File Layout will be sent once changes to FAFSA are identified and the Online TASFA updates are confirmed.
- The State Priority Deadline (Jan. 15) is being reviewed by the THECB to determine if modifications are possible, if the FAFSA is delayed.



FORWARD Loan Program

Future Occupations & Reskilling Workforce Advancement to
Reach Demand

Now Available **FORWARD** Loan Program

Future Occupations & Reskilling Workforce Advancement to Reach Demand (FORWARD) Loans has several unique characteristics:

- Eligibility tied to high-value/high-demand credentials
- A low interest rate - 3.35%
- Borrowing limits and repayment will be tied to the student's calculated manageable debt
- CommonLine file processing is not yet available for this program

2022-23
Program Guidelines

Future Occupations & Reskilling
Workforce Advancement to
Reach Demand (FORWARD)
Loan Program

**Texas Higher
Education**
COORDINATING BOARD

High-Value/High-Demand Credentials

This program is limited to students enrolled in specific programs within the fields of:

- Energy
- Nursing/Patient Care
- Teaching
- Technology
- Transportation/Logistics

FORWARD Loan

Eligible Programs of Study
FY 2023 (2022-2023)

Texas Higher
Education
COORDINATING BOARD

The Future Occupations & Reskilling Workforce Advancement to Reach Demand (FORWARD) Loan Program is a low-interest loan designed for students enrolled in programs aligned with high-value credentials and high-demand occupations. This program is limited to students enrolled in specific programs within the fields of [Energy](#), [Nursing/Patient Care](#), [Teaching](#), [Technology](#), and [Transportation/Logistics](#). To read more about this program, visit [hhloans](#).

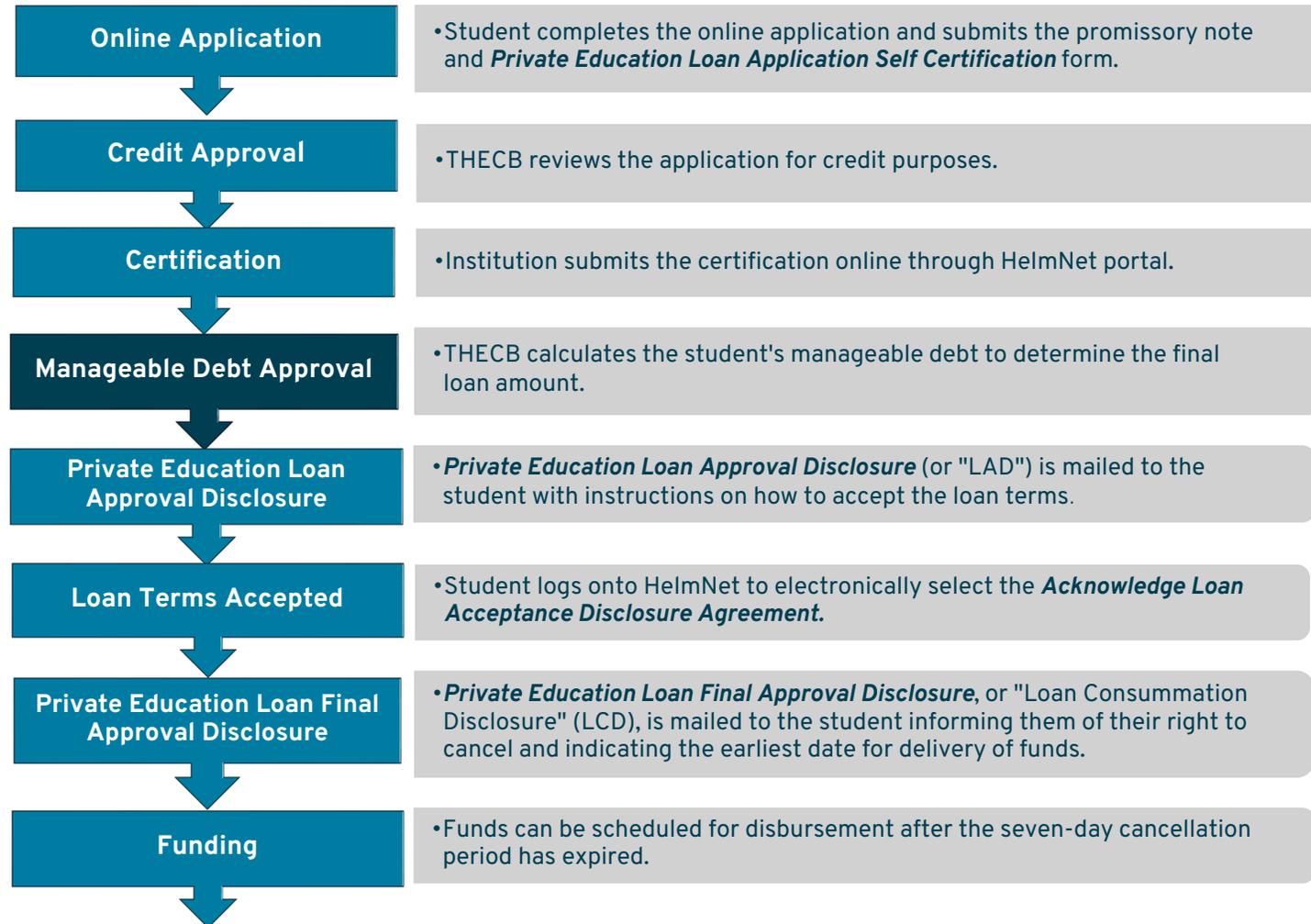
Energy

Program Name/Description	CIP Code
Aircraft Powerplant Technology/Technician	47.0608
Alternative Fuel Vehicle Technology/Technician	47.0614
Biochemical Engineer	14.4301
Bioenergy	03.0210
Biological/Biosystems Engineering	14.4501
Chemical and Biomolecular Engineering	14.0702
Chemical Engineering	14.0701
Chemical Engineering Technology/Technician	15.0615
Chemical Process Technology	41.0303
Electrical and Electronics Engineering	14.1001
Electrical and Power Transmission Installation/Installer, General	46.0301
Electrical and Power Transmission Installers, Other	46.0399
Electrician	46.0302
Electromechanical Engineering	14.4101
Energy and Environmental Policy	03.0209
Energy Management and Systems Technology/Technician	15.1701
Energy Systems Engineering General	14.4801
Energy Systems Engineering, Other	14.4899
Energy Systems Installation and Repair Technology/Technician	47.0701
Energy Systems Technologies/Technicians, Other	15.1799
Energy, Environment and Natural Resources Law	22.0207
Engineering Physics/Applied Physics	14.1201
Environmental/Natural Resource Economics	03.0204
Geothermal Energy System Installation and Repair Technology/Technician	47.0706
Geothermal Energy Technology/Technician	15.1706
Hydraulics and Fluid Power Technology/Technician	15.1103

Eligible Programs of Study

<https://reportcenter.highered.texas.gov/agency-publication/miscellaneous/forward-program-fy-2023-high-demand-credentials-listing/>

FORWARD Application Flow



Certification Files in MOVEit

The screenshot shows the MOVEit file management interface. At the top, the breadcrumb path is 'Home > Loans_Output'. Below this is a search bar labeled 'Find:' and a dashed box for file uploads with the text 'Drop files to upload.' and an 'Upload Files' button. The main area contains a table of files with columns for Name, Size/Contents, Creator, Created, and Actions. The file '_SCHCRT_FRW_SCAPPRTPRN20230301' is highlighted with a red box. The file '_CERT_FORWARD.CSV20230301' is also highlighted with a red box.

<input type="checkbox"/>	Name	Size/Contents	Creator	Created		Actions
<input type="checkbox"/>	<i>Parent Folder</i>					
<input type="checkbox"/>	_SCHCRT_FRW_SCAPPRTPRN20230301	3.3 KB	dsv_moveitcentral_service	3/1/2023 8:25:00 AM	-	
<input type="checkbox"/>	_CERT_FORWARD.CSV20230301	1 KB	dsv_moveitcentral_service	3/1/2023 8:25:00 AM	-	
<input type="checkbox"/>	CLRF4APSPN20230301	8.1 KB	dsv_moveitcentral_service	3/1/2023 8:24:20 AM	-	
<input type="checkbox"/>	LRF4APPUPD20230301	60 KB	dsv_moveitcentral_service	3/1/2023 8:23:14 AM	-	

Identifying Applications

Change Password Logout

- New School Certification Inquiry
 - Application Query ←
 - Borrower Query ←
 - Loan Query
 - Disbursal Query
- Loan Reporting ←
- Login Tips
- ACH Enrollment Tips

Welcome

Welcome to the Texas Higher Education Coordinating Board

NEW We are excited to announce that we have a new low-interest loan option for Texas students. The Future Occupations and Reskilling Workforce Advancement to Reach Demand (FORWARD) Loan Program is designed for students who are at least halfway to completing specific degree or certification programs within the fields of Energy, Nursing/Patient Care, Teaching, Technology, and Transportation/Logistics. To see if your program is eligible, [refer to the full list here](#). To qualify, you must be able to complete your program within two years or less.

2022 Tax Information: The Texas Higher Education Coordinating Board mailed 1098-E/1099-C tax information to the mailing address on file as of Jan. 31, 2023. The 2022 interest paid amounts are now available by accessing your online account.

If you are unable to access your account or update your demographic information online, please contact our Customer Support Center at (800) 242-3062, Monday through Friday, 8:00 a.m. to 5:00 p.m. CST.



Application Query Search

[Change Password](#) [Logout](#)

- New School Certification Inquiry
 - Application Query
 - Borrower Query
 - Loan Query
 - Disbursal Query
- Loan Reporting
- Login Tips
- ACH Enrollment Tips

[Application Query](#) Application Query

Application Status Query

Application Status Query Application Process Query

Application Type:

Borrower Applications

ANY

- ANY
- TEXAS ARMED SERVICES (ASP)
- TEXAS B-ON-TIME (BOA)
- TEXAS B-ON-TIME (BOH)
- TEXAS B-ON-TIME (BOS)
- COLLEGE ACCESS LOAN (CAL)
- FORWARD LOAN - DEGREE (FWD)
- FORWARD LOAN NON-DEGREE (FWN)

Add Additional Application Type

School Name:

Lender:

Application Form:

Application Status:

Any

CommonLine Unique ID:

Records Returned Per Page:

25

Search

Application Query Search

Texas Higher Education COORDINATING BOARD

Change Password Logout

Application Query Application Query

Application Status Query

Application Status Query Application Process Query

Application Type: Borrower Applications

FORWARD LOAN NON-DEGREE (FWN) **Add Additional Application Type** ←

School Name: [Text Input]

Lender: THECB (812089)

Application Form: Any

Application Status: Any

CommonLine Unique ID: Any
Needs School Certification
Error Correction Needed (All)
Error Correction Needed for the 2023 Academic Year
Error Correction Needed for the 2024 Academic Year
Application Cancelled (All)
Application Cancelled by School
Application Cancelled by THECB

Records Returned Per Page:

Application Query Results

Texas Higher Education COORDINATING BOARD

Change Password Logout

New School Certification Inquiry

- Application Query
- Borrower Query
- Loan Query
- Disbursal Query

Loan Reporting
Login Tips
ACH Enrollment Tips

Application Query Application Query ✖

Application Status Query

3 Borrowers, 3 Applications Returned

Sort Results:

SSN	Name		Requested Amount	Borrower Complete	Cosigner Complete	School Certified	Last Updated
***-**-2025	TEST, EMMA						
	Application Number	Loan Type					
	FW0001	FORWARD LOAN NON-DEGREE (FWN)	\$8,500.00	Y		N	02/14/2023
***-**-2025	TEST, WYATT						
	Application Number	Loan Type					
	FW0001	FORWARD LOAN NON-DEGREE (FWN)	\$9,500.00	Y	Y	N	02/13/2023
***-**-2025	WAZOWSKI, MIKE						
	Application Number	Loan Type					
	FW0001	FORWARD LOAN NON-DEGREE (FWN)	\$8,000.00	Y	Y	N	02/14/2023

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Borrower Query Search

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New School Certification Inquiry

- Application Query
- Borrower Query**
- Loan Query
- Disbursal Query

Loan Reporting
Login Tips
ACH Enrollment Tips

Application Query Borrower Query Borrower Query

Borrower Query

Input a full or partial, SSN and/or last name OR Reference Number to search for results.

SSN:

Full SSN Entry (#####) OR Last 4 SSN Entry (*****)

Reference Number:

Last Name:

First Name:

Records Returned Per Page:

Borrower Query Results

Texas Higher Education COORDINATING BOARD

Change Password Logout

New School Certification Inquiry

- Application Query
- Borrower Query**
- Loan Query
- Disbursal Query

Loan Reporting
Login Tips
ACH Enrollment Tips

Application Query Borrower Query Borrower Query

Borrower Query

SSN	Name
***-**-2025	TEST, EMMA

Return To Borrower Query

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Borrower Query

New School Certification Inquiry

- Application Query
- Borrower Query**
- Loan Query
- Disbursal Query
- Loan Reporting
- Login Tips
- ACH Enrollment Tips

Borrower Summary

***-**-2025
TEST, EMMA 
3 APPROVED AVE
AUSTIN, TX 78701

Reference Number: 3777743989
Home Phone: (987) 456-3210
Cell Phone: NOT ON FILE
Work Phone: NOT ON FILE
Email: THECBTESTINGSB@GMAIL.COM

Click here to start a Texas Armed Service Scholarship Program (TASSP) Application [New TASSP School Certification](#)

 Applications

Loan Applications on File

Click the  below to certify and edit certification for an existing borrower-initiated application and selecting 'Edit Certification Information'.

Application ID	Application Type	Requested Amount	Current Status	Status Date	CommonLine Unique ID
 FW0001	FORWARD LOAN NON-DEGREE	\$8,500.00	Click Here for Status	02/12/2023	8120890003W00N042

Borrower Query

Borrower Detail

***-**-2025
TEST, EMMA
 3 APPROVED AVE
 AUSTIN, TX 78701

Reference Number: 3777743989
 Home Phone: (987) 456-3210
 Cell Phone: NOT ON FILE
 Work Phone: NOT ON FILE
 Email: THECBTESTINGSB@GMAIL.COM

Reference Number: 2777742985
 Home Phone:
 Cell Phone: NOT ON FILE
 Work Phone: NOT ON FILE
 Email:

Application Summary for FW0001

- This is a FORWARD LOAN NON-DEGREE application.
- The requested amount is \$8,500.00.
- This application was made for attendance at
- CommonLine unique identifier is 8120890003W00N042.
- For the loan period of 1/9/2023 to 5/15/2023.

[Return To Borrower Summary \(EMMA TEST\)](#)

Click the  below to certify and edit certification for an existing borrower-initiated application and selecting 'Edit Certification Information'.

Application ID	Application Type	Requested Amount	Current Status	Status Date	CommonLine Unique ID
FW0001	FORWARD LOAN - DEGREE	\$9,500.00	Click Here for Status	02/12/2023	8120890003W00N043

[Edit Certification Information](#)

Borrower Query

Texas Higher Education COORDINATING BOARD

Test

[Change Password](#) [Logout](#)

New School Certification Inquiry

- [Application Query](#)
- [Borrower Query](#)
- [Loan Query](#)
- [Disbursal Query](#)
- [Loan Reporting](#)
- [Login Tips](#)
- [ACH Enrollment Tips](#)

Borrower Query
Borrower Summary
TEST

Borrower Summary

*****-**-2025**

TEST, EMMA

3 APPROVED AVE

AUSTIN, TX 78701

Click here to start a Texas Armed Service Scholarship Program (TASSP) Application New TASSP School Certification

- Applications

Loan Applications on File

Click the + below to certify and edit certification for an existing borrower-initiated application and selecting 'Edit Certification Information'.

Application ID	Application Type	Requested Amount	Current Status	Status Date	CommonLine Unique ID	
FW0001	FORWARD LOAN - DEGREE	\$9,500.00	<div style="border: 1px solid #ccc; padding: 2px 5px; display: inline-block;">Click Here for Status</div>	02/12/2023	8120890003W00N043	<div style="border: 2px solid red; padding: 2px 5px; display: inline-block;">Edit Certification Information</div>

Application status for
in the amount ✕

of \$9,500 (CLUID: 8120890003W00N043)

Status: Incomplete

Task	Completion Date	Responsibility
✓ Borrower Application Completed ?	2/12/2023	Borrower
✓ Borrower Application Signed ?	2/12/2023	Borrower
✓ Private Education Loan Applicant Self-Certification (BCF) Signed ?	2/12/2023	Borrower
✓ Cosigner Application Completed ?	2/12/2023	Cosigner
✓ Cosigner Application Signed ?	2/12/2023	Cosigner
✓ Credit Approved ?	2/12/2023	Lender
— Lender Approval Completed ?		Lender
— School Certification Completed ?		School
— Loan Guaranteed ?		Lender
— Private Education Loan Approval Disclosure (LAD) Sent ?		Lender
— Private Education Loan Approval Disclosure (LAD) Accepted ?		Borrower
— Private Education Loan Final Approval (LCD) form Sent ?		Lender
— Required Right to Cancel Waiting Period ?		Borrower
— Ready to Disburse ?		Lender

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Borrower Query

Texas Higher Education COORDINATING BOARD

Test | Change Password | Logout

[Borrower Query](#) | Borrower Summary | TEST) ✕

Borrower Summary

***-**-2025
TEST, EMMA 
3 APPROVED AVE
AUSTIN, TX 78701

Reference Number: 2777742985
Home Phone:
Cell Phone: NOT ON FILE
Work Phone: NOT ON FILE
Email:

[Click here to start a Texas Armed Service Scholarship Program \(TASSP\) Application](#) | [New TASSP School Certification](#)

☾ Applications

Loan Applications on File

Click the  below to certify and edit certification for an existing borrower-initiated application and selecting 'Edit Certification Information'.

Application ID	Application Type	Requested Amount	Current Status	Status Date	CommonLine Unique ID	
FW0001	FORWARD LOAN - DEGREE	\$9,500.00	Click Here for Status	02/12/2023	8120890003W00N043	Edit Certification Information

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School Certification

School Certification

Loan Information	
Application Type:	FORWARD LOAN - DEGREE
CommonLine Unique ID:	8120890003W00N043
Application ID:	FW0001
School Code:	
School Information:	

Borrower Information

Borrower Information	
First Name	EMMA
Middle Initial	
Last Name	TEST
Date of Birth	04/15/1991
SSN	***-**-2025
Street Address 1	3 APPROVED AVE
Street Address 2	
City	AUSTIN
State	Texas
ZIP	78701 -

Eligibility Questions

Eligibility Questions

Are you a Texas resident?

Yes No

Have you met satisfactory academic progress requirements set by your institution? [?](#)

Yes No

Are you enrolled in a degree program or non-degree program?



Degree Program Non-Degree Program

Degree program is an academic associate degree or higher. Non-degree program is a non-credited certification where the program's duration must be less than two years.

Have you completed at least 50% of the required coursework prior to receiving a loan through the degree program? [?](#)

Yes No

Are you enrolled in a master's degree program? [?](#)

Yes No

Is the program part of a combined baccalaureate-master's program? [?](#)

Yes No

Program of Study

Programs of Study

Programs of Study are predetermined courses that prepare students with the knowledge and skills necessary for success in their chosen career. The THECB determines eligible Programs of Study which focus on students who are completing high-value/high-demand credentials throughout the State of Texas.

Refine Program Category and Subcategory Dropdown Lists (Optional)

If you would like to refine the program category and subcategory dropdown lists; you may enter in a program of study keyword or CIP code and then click the "Refine" button. If the results do not help you make a selection; click the "Clear" button to return to the full program category and subcategory dropdown lists.

Program Category (Select One)

Energy
Nursing/Patient Care
Teaching
Technology
Transportation/Logistics

Program Subcategory

51.3815 - Occupational and Environmental Health Nursing

If your "Program Category" or "Program Subcategory" are not listed, return to Apply Online\Continue App to consider applying for a College Access Loan or contact the institution you plan to attend to determine next steps.

Enrollment Information

Enrollment Information	
Academic loan period	08/22/2022  28 to 05/15/2023  28
Anticipated Graduation Date	12/15/2023  28

Financial Aid Information	
Requested Loan Amount	9500
Cost of Attendance	25000
Estimated Financial Aid	20000
Certified Loan Amount	5000

Disbursement Information

Disbursal Information	
Number of Disbursals	<input type="text" value="2"/>
Disbursal 1 Date	<input type="text" value="03/01/2023"/> 
Disbursal 1 Amount	<input type="text" value="2500"/>
Disbursal 2 Date	<input type="text" value="04/01/2023"/> 
Disbursal 2 Amount	<input type="text" value="2500"/>
Disbursal 3 Date	<input type="text"/> 
Disbursal 3 Amount	<input type="text"/>
Disbursal 4 Date	<input type="text"/> 
Disbursal 4 Amount	<input type="text"/>

Certification

Certification

I have applied or cause to have applied the rules of the FORWARD Loan and the Hinson-Hazlewood College Student Loan Programs and certify the following, to the best of my knowledge:

1. The borrower named on this application is an eligible student in accordance with the rules of the FORWARD Loan and the Hinson-Hazlewood College Student Loan Programs,
2. The borrower is not incarcerated,
3. The borrower is eligible for a loan in the amount certified,
4. The disbursement schedule complies with the requirements of the FORWARD Loan and the Hinson-Hazlewood College Student Loan Programs,
5. Based on records available and inquiry made, the borrower is not liable for an overpayment on any state or federal grant,
6. The information provided is true, complete, and accurate,
7. The borrower's request for the loan can be evidenced in our Financial Aid Office by the borrower's active OR passive confirmation of our offer of the proposed loan amount.

The amount of this loan may not exceed the difference between the cost of attendance and other forms of student assistance for which the student may be eligible. Other sources of student assistance include gifts, grants, scholarships, federal Perkins loans (to the extent that your institution has available Perkins funds), and Stafford loans (subsidized and unsubsidized), but not federal PLUS loans.

- Not Eligible to Certify
- Certify

The application has been certified.

Submit

Application Checklist

Application status for _____ in the amount _____ ✖

of \$9,500 (CLUID: 8120890003W00N043)

Status: Incomplete

Task	Completion Date	Responsibility
✓ Borrower Application Completed ?	2/12/2023	Borrower
✓ Borrower Application Signed ?	2/12/2023	Borrower
✓ Private Education Loan Applicant Self-Certification (BCF) Signed ?	2/12/2023	Borrower
✓ Cosigner Application Completed ?	2/12/2023	Cosigner
✓ Cosigner Application Signed ?	2/12/2023	Cosigner
✓ Credit Approved ?	2/12/2023	Lender
— Lender Approval Completed ?		Lender
✓ School Certification Completed ?	2/28/2023	School
— Loan Guaranteed ?		Lender
— Private Education Loan Approval Disclosure (LAD) Sent ?		Lender
— Private Education Loan Approval Disclosure (LAD) Accepted ?		Borrower
— Private Education Loan Final Approval (LCD) form Sent ?		Lender
— Required Right to Cancel Waiting Period ?		Borrower
— Ready to Disburse ?		Lender



THECB completes manageable debt calculation to determine final eligibility. Depending on the calculation, the loan could be reduced or canceled by the THECB.

Eligibility Questions – Not Eligible

Eligibility Questions

Are you a Texas resident?

Yes No

You must be a Texas resident to apply for a FORWARD loan through the THECB.

Have you met satisfactory academic progress requirements set by your institution? [?](#)

Yes No

Are you enrolled in a degree program or non-degree program? [?](#)

Degree Program Non-Degree Program

Is the program duration you are enrolled in less than two years? [?](#)

Yes No

The current answers to the eligibility questions has determined that the borrower is not eligible for a FORWARD loan. Please scroll to the Certification section, select "Not Eligible to Certify" and click Submit.

Not Eligible to Certify

Certification

I have applied or cause to have applied the rules of the FORWARD Loan and the Hinson-Hazlewood College Student Loan Programs and certify the following, to the best of my knowledge:

1. The borrower named on this application is an eligible student in accordance with the rules of the FORWARD Loan and the Hinson-Hazlewood College Student Loan Programs,
2. The borrower is not incarcerated,
3. The borrower is eligible for a loan in the amount certified,
4. The disbursement schedule complies with the requirements of the FORWARD Loan and the Hinson-Hazlewood College Student Loan Programs,
5. Based on records available and inquiry made, the borrower is not liable for an overpayment on any state or federal grant,
6. The information provided is true, complete, and accurate,

The borrower's request for the loan can be evidenced in our Financial Aid Office by the borrower's active OR passive confirmation of our offer of the proposed loan amount.

The amount of this loan may not exceed the difference between the cost of attendance and other forms of student assistance for which the student may be eligible. Other sources of student assistance include gifts, grants, scholarships, federal Perkins loans (to the extent that your institution has available Perkins funds), and Stafford loans (subsidized and unsubsidized), but not federal PLUS loans.

Not Eligible to Certify

Certify

The application has been cancelled.

Submit

Not Eligible to Certify

Application status for _____ in the amount _____ ✖
of \$9,500 (CLUID: 8120890003W00N044)

Status: Canceled

Task	Completion Date	Responsibility
✓ Borrower Application Completed ?	2/12/2023	Borrower
✓ Borrower Application Signed ?	2/12/2023	Borrower
✓ Private Education Loan Applicant Self-Certification (BCF) Signed ?	2/12/2023	Borrower
✓ Cosigner Application Completed ?	2/12/2023	Cosigner
✓ Cosigner Application Signed ?	2/12/2023	Cosigner
✓ Credit Approved ?	2/12/2023	Lender
✗ Lender Approval Completed ?		Lender
✗ School Certification Completed ?		School
✗ Loan Guaranteed ?		Lender
✗ Private Education Loan Approval Disclosure (LAD) Sent ?		Lender
✗ Private Education Loan Approval Disclosure (LAD) Accepted ?		Borrower
✗ Private Education Loan Final Approval (LCD) form Sent ?		Lender
✗ Required Right to Cancel Waiting Period ?		Borrower
✗ Ready to Disburse ?		Lender

Financial Aid Database (FAD)

Database Submission Portal

FAD Report Manual

- Manual released 1/26/23

Data elements (114-118) were added, which are marked "New" in the manual and are required for cycle 2:

- 114 - Texas First Scholarship
 - 115 - Bilingual Education
 - 116 - Educational Aide Exemption
 - 117 - Educational Aide Exemption Match
 - 118 - FORWARD Loan Program
- **Modified** version...coming soon!



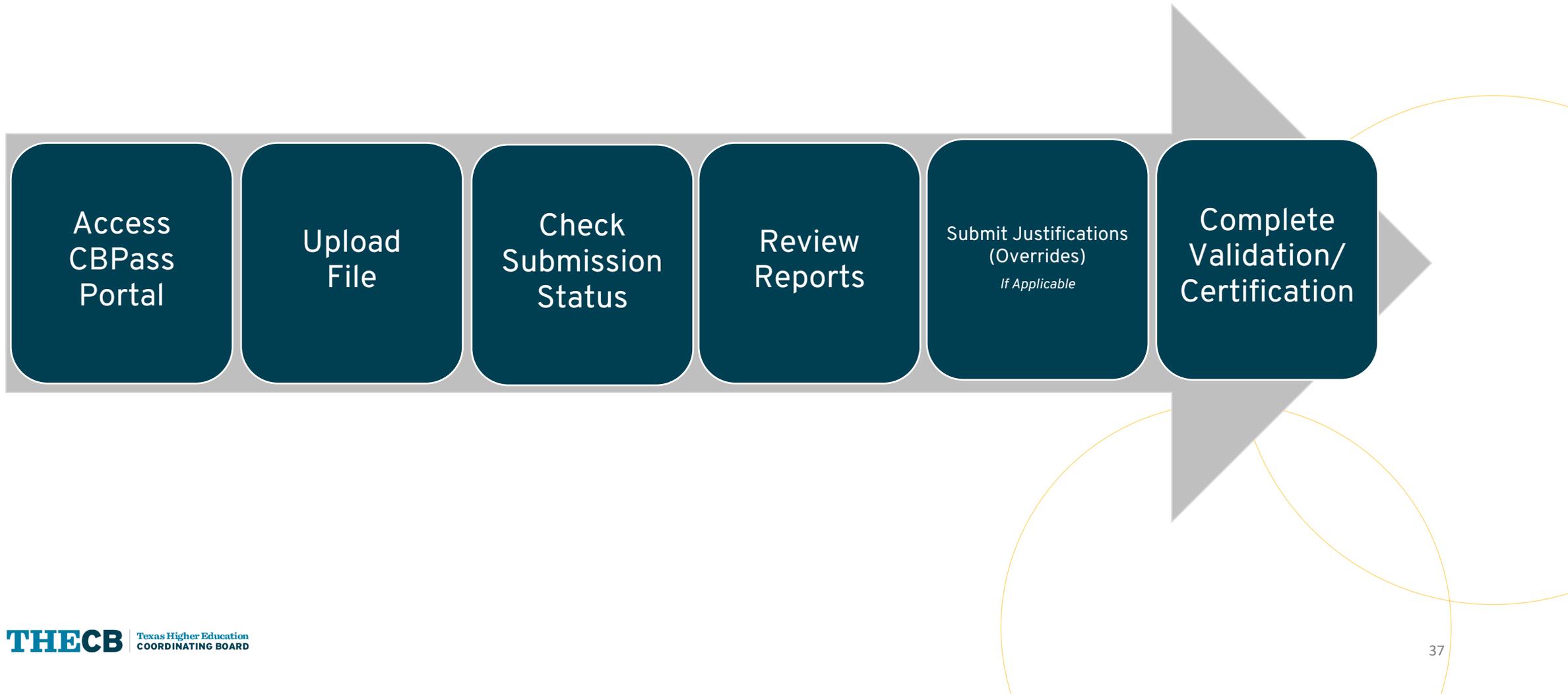
FAD Processing Dates

To ensure FAD files are validated/certified in a timely manner, institutions will be required to submit an initial FAD file by the deadline listed below (excluding Cycle One). Updates are being made to the FY 2023 FAD Manual to account for these changes.

Reporting Cycle Dates ^{Revised}

Reporting Cycle	First Day to Submit	Deadline to Submit Initial FAD File*	Deadline to Validate or Certify FAD file	Submission Requirements
First	March 9, 2023	N/A	April 17, 2023	Deadline to validate student data.
Second	June 7, 2023	June 23, 2023	Aug. 14, 2023	Deadline to validate student data.
Third	Sept. 20, 2023	Oct. 13, 2023	Nov. 13, 2023	Deadline to reconcile state program totals and certify student data.

Data Submission Portal Flow



Access Portal

CBPass



Accessing the Portal



Access the Data Submission Portal

New Users – Create Account

CBPass Login

Sign in with your CBPass Account

*Username:

*Password:

[Forgot your Username or Password?](#)

don't have an account? [create one now!](#)

Access the Data Submission Portal

New Users – Create Account

CBPass - New User Registration

To create a CBPass account, enter the information below, then click on the *Register* button. Once you have registered you will be able to request access to applications.
All fields are required.

Note: Nominators for the Texas Armed Services Scholarship Program (TASSP) enter the office of the elected official you are affiliated with.

- You must begin by first typing the title - Representative, Senator, Governor or Lieutenant - then from the drop-down menu select your official's name.

Account Information

•First Name [required]:

Middle Initial:

•Last Name [required]:

•Begin typing to enter/modify your affiliation or type "Other" [required]:
Affiliated with an elected official? Begin typing the title ("Senator," "Representative," "Governor," "Lieutenant"), then select from the drop-down.

•Physical Address [required]:
 -

•Telephone Number [required]:

•E-Mail Address [required]:

•Re-Type E-Mail Address [required]:

•User Name [required]: (Used for login)

•Password [required]:
Passwords must be at least eight (8) characters and contain at least 3 of the 4 following attributes: uppercase letter, lowercase letter, number, special character.

•Re-Type New Password [required]:

•Enter the answer to the math problem [required]:

[required] I agree to the [CBPass Account Agreement](#) (link opens in a new window)

Access the Data Submission Portal

All Users - Request Access

CBPass Login

Sign in with your CBPass Account

*Username:

*Password:

[Forgot your Username or Password?](#)

don't have an account? [create one now!](#)

Access the Data Submission Portal

All Users - Request Access

The image displays two overlapping screenshots of the CBPass user interface. The top screenshot shows the 'MY ACCESS' tab with a link 'Click to Request Access to another application' highlighted by a red box. A red arrow points from this link to the 'Request Access' dropdown menu in the bottom screenshot. The bottom screenshot shows the 'Request Access' dropdown menu with 'Data Submission Portal' selected. The interface includes a header with 'CBPass Welcome' and navigation links for '(Main Menu)' and '(Logout)'. Below the header are tabs for 'MY ACCESS' and 'PROFILE'. A search bar is present with the text 'Search for and view your current applications or request access to additional applications.' The 'Request Access' dropdown menu lists various applications, including 'Online TASFA Azure', 'AAR Graduate Program Review', 'Academic Course Guide Manual', 'Accountability', 'Accountability Institution Portal', 'Accountability_OLD', 'Business Management System', 'Certificate of Authorization Institution Portal', 'Community College Annual Reporting and Analysis Tool', 'Data Submission Portal', 'Developer Tools', 'Distance Education Portal', 'EDC Portal', 'Family Medicine Resident Roster Load', 'Financial Aid Data Certification', 'Fraudulent Institutions', 'Good Neighbor Program', 'Grant Payment', 'Integrated Fiscal Reporting System', and 'Intellectual and Developmental Disabilities Inventory'.

Access the Data Submission Portal

All Users - Request Access

MY ACCESS **PROFILE**

Search for and view your current applications or request access to additional applications.

✔ Thank you for your request. It is in the process of implementation. You will be receiving an e-mail soon with further information.

[Click to Request Access to another application](#) [Instructions ?](#)

Filters

App ID: App Name: All Owner:
App Status: All Access Status: All Role: All

Record Count= 1

App ID	Application Name	Owner(s)	Delegate(s)/Admin	Role	App Status	Access Status	
147	Data Submission Portal	Kishore.Mattapalli@highered.texas.gov, Pavani.Parsi@highered.texas.gov, DeCha.Reid@highered.texas.gov		CBUser	Active	Approved	Remove Access

Access the Data Submission Portal

Texas Higher Education COORDINATING BOARD

Home Reports ▾ Certification ▾ Reporting Manual

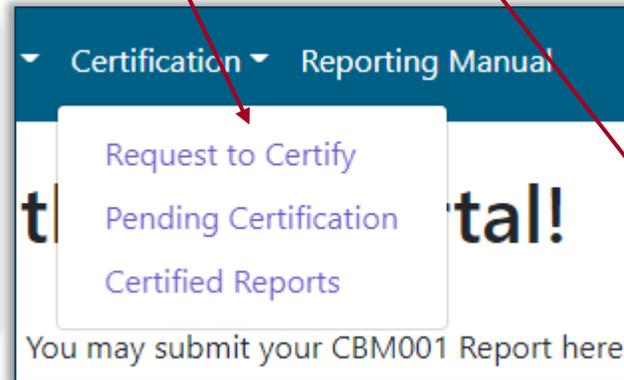
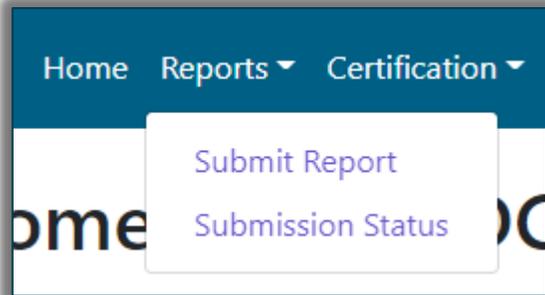
Hello TaTanisha (Logout)

Use this space to summarize your privacy and cookie use policy. [Learn More.](#) **Accept**

Welcome to the Data Submission Portal!

Welcome to the new Data Submission Portal.
If you have any questions or issues, please direct them to John Dinning at John.Dinning@highered.texas.gov.

Portal Toolbar



CBM Reporting Manuals
Reporting manuals, appendices and other resources for submitting institution and student-level data to the Texas Higher Education Coordinating Board.

Reporting and Procedures Manuals

- Career Schools and Colleges and Private and Out-of-State Public Postsecondary Institutions ([PDF](#))
- Community, Technical and State Colleges ([PDF](#))
- Health-Related Institutions ([PDF](#))
- Independent Colleges and Universities ([PDF](#))
- Public Universities ([PDF](#))

CBM Reporting Manuals for Spring 2021

- Community, Technical and State Colleges ([PDF](#))
- Public Universities ([PDF](#))

CBM Reporting Manual Supplements for Spring 2022

- Community, Technical and State Colleges ([PDF](#))
- Public Universities ([PDF](#))

Appendices to the CBM Reporting Manuals

- Appendix A-J and N-P - FICE Codes, Residence Codes, CIP Codes, Administrative Unit Codes, Facilities Codes, GME Formula Funding and Space Model Funding, Reference Tables ([PDF](#))
- Appendix K - ACGME and AOA Residency Programs in Texas ([XLS](#))
- Appendix L - Medical Schools ([XLS](#))
- Appendix M - Texas CEEB Codes ([XLS](#))
- Appendix Q - Guidelines for Reporting First College-Level Courses ([PDF](#))

Recommended Course Sequence

- [Recommended Course Sequence Reporting](#)

Financial Aid Database System (FADS)

- FY 2022 FAD Comprehensive Reporting Manual ([PDF](#))
- FY 2021 FAD Comprehensive Reporting Manual ([PDF](#))

Upload File

Data Submission Portal

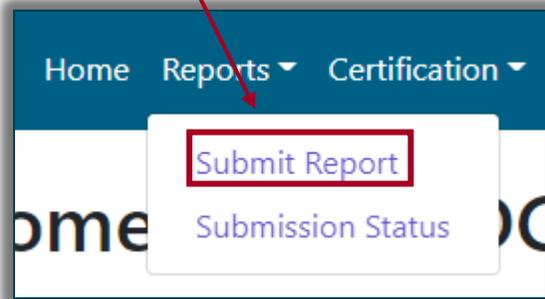


Submitting a Report

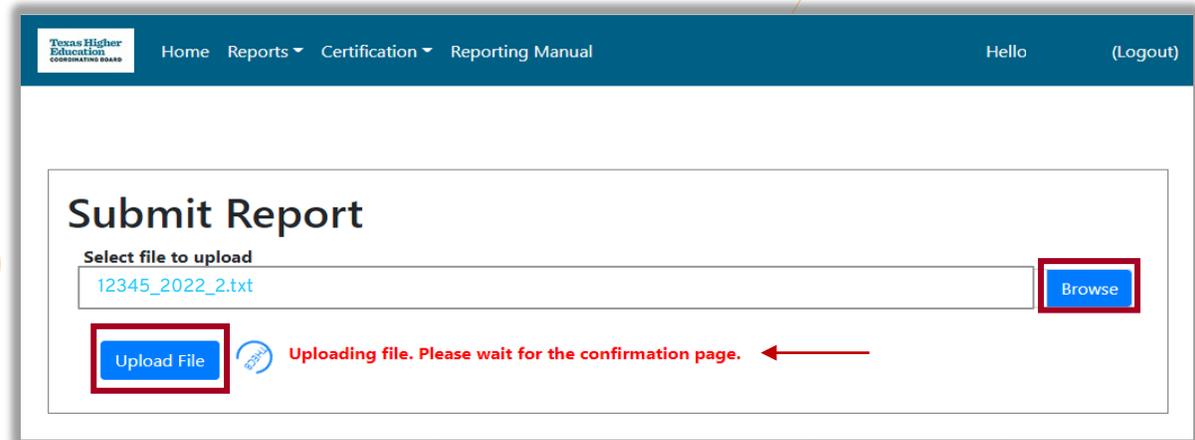
Submitting A Report



1



2





Real-Time Upload Messages

Successful Upload

Texas Higher Education COORDINATING BOARD Home Reports ▾ Certification ▾ Reporting Manual

Thank you! Your file has been received and is processing. You may view your submission on the Submission Status page.

Upload Errors

Texas Higher Education COORDINATING BOARD Home Reports ▾ Certification ▾ Reporting Manual

The file cannot be processed - Invalid Record Code (File Label Id)

Texas Higher Education COORDINATING BOARD Home Reports ▾ Certification ▾ Reporting Manual

The file cannot be processed - Invalid Fice Code



Submission Status

Texas Higher Education Coordinating Board

Home Reports Certification Reporting Manual Hello (Logout)

Submit Report
Submission Status

Submission Status

Report Type: Select All Reporting Year: Select All Reporting Period: Select All Start Date: 07/19/2022 End Date: 08/18/2022 [Get Submission Status](#)

Submission Status

Show 10 entries Search:

View Report	Input File	FICE	Type	Year	Period	Submitter Email	Date Submitted	Status
297793	Download	012015	FAD001	2022	Cycle 2	thebtest@yahoo.com	08/18/2022 03:03 PM	Processing

Review/Download Reports

Data Submission Portal



Review Reports



Viewing Reports

- *Edit Report (ECR)- Includes the following:*
 - **Edit Summary**
 - **Error Report**
 - **Warning/Questionable Report**
- *Reconciliation Report (Recon)*
- *Program Comparison Report (PCR)*
- *Unmatched SSN Report (SSN) - Cycle 3 Only*

The screenshot shows the 'Submission Status' page in the reporting manual. At the top, there is a navigation bar with the Texas Higher Education Coordinating Board logo and links for Home, Reports, Certification, and Reporting Manual. The user is identified as 'Helle' with a '(Logout)' link.

Below the navigation bar, there is a 'Submission Status' section with filter options: Report Type (Select All), Reporting Year (Select All), Reporting Period (Select All), Start Date (12/25/2022), and End Date (01/24/2023). A 'Get Submission Status' button with a refresh icon is also present.

The main content area is titled 'Submission Status' and includes a search bar and a table of report entries. The table has columns for View Report, Input File, FICE, Type, Year, Period, Submitter Email, Date Submitted, and Status. Two entries are visible, both with a 'Submitted' status. The first entry (ID 391928) is highlighted with a red box, and its 'Submitted' status is also highlighted with a red box.

View Report	Input File	FICE	Type	Year	Period	Submitter Email	Date Submitted	Status
391928 ECR Recon PCR	Download	003543	FAD001	2022	Cycle 2	prod003543@gmail.com	01/18/2023 01:22 PM	Submitted
391925 ECR Recon PCR	Download	003543	FAD001	2022	Cycle 2	prod003543@gmail.com	01/18/2023 09:43 AM	Submitted

Showing 1 to 4 of 4 entries

Previous 1 Next



Report Download Options

Texas Higher Education COORDINATING BOARD

Home Reports Certification Reporting Manual

Submission Status

Report Type Reporting Year Report

Show entries

	View Report	Input File	FIC
391928 ECR Recon PCR		Download	003
391925 ECR Recon PCR		Download	003

Showing 1 to 4 of 4 entries

File View Export 1 of 2 Print now

TEXAS HIGHER EDUCATION COORDINATING BOARD

Reconciliation Report

Austin Community College

Microsoft Excel (.xlsx)
PDF (.pdf)
Accessible PDF (.pdf)
Microsoft PowerPoint (.pptx)

Item Number		THECB Count of Students	THECB Amount Reported	Institution Count of Students	Institution Amount Reported
10	Exempt Waiv Award 1	N/A	N/A	1,127	2,558,937
13	Exempt Waiv Award 2	N/A	N/A	0	0
16	Exempt Waiv Award 3	N/A	N/A	0	0
19	Exempt Waiv Award 4	N/A	N/A	0	0
48	Tuit Exempt Waiv	N/A	N/A	0	0
49	Categorical Aid	N/A	N/A	322	604,677
50	Federal Pell	N/A	N/A	9,603	30,304,963
51	Federal SEOG	N/A	N/A	2,405	1,603,548
52	TPEG	N/A	N/A	2,500	2,514,944
53	Tuition Differential	N/A	N/A	0	0
54	TEG State and GEER Total	0	0	0	0
	TEG State Appropriation	N/A	N/A	N/A	N/A
	TEG GEER	N/A	N/A	N/A	N/A
60	HB3015 Grants and Scholarships	N/A	N/A	0	0
61	Restricted Grants and Scholarships	N/A	N/A	535	765,925
62	Unrestricted Grants and Scholarships	N/A	N/A	251	389,547
63	Federal VA Benefits	N/A	N/A	1,208	2,991,884
64	Athletic Grants and Scholarships	N/A	N/A	0	0
65	Student Deposit Scholarships	N/A	N/A	0	0
66	Other Federal Grants and Scholarships	N/A	N/A	0	0
67	Other State Grants and Scholarships	N/A	N/A	0	0

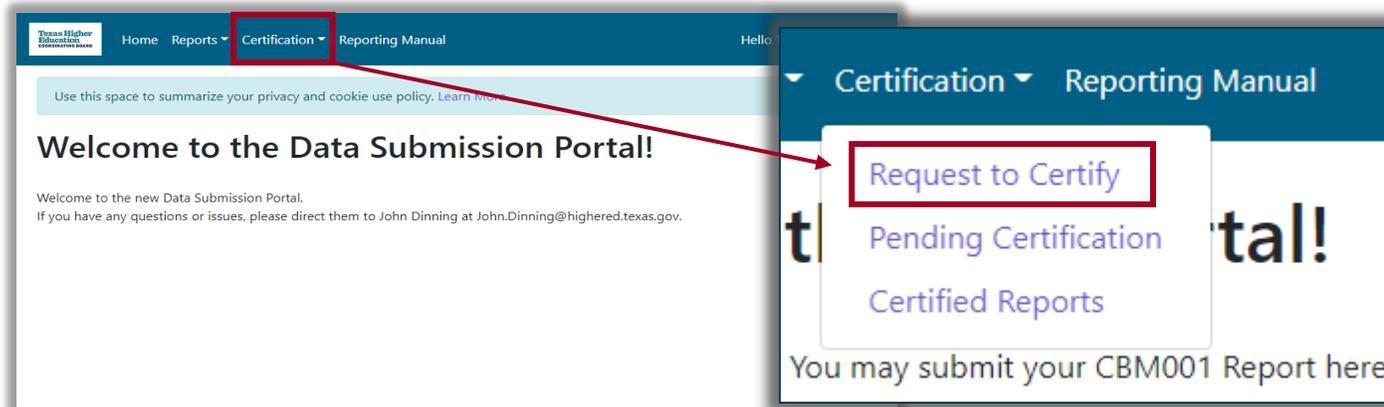
Submit Justifications

Data Submission Portal

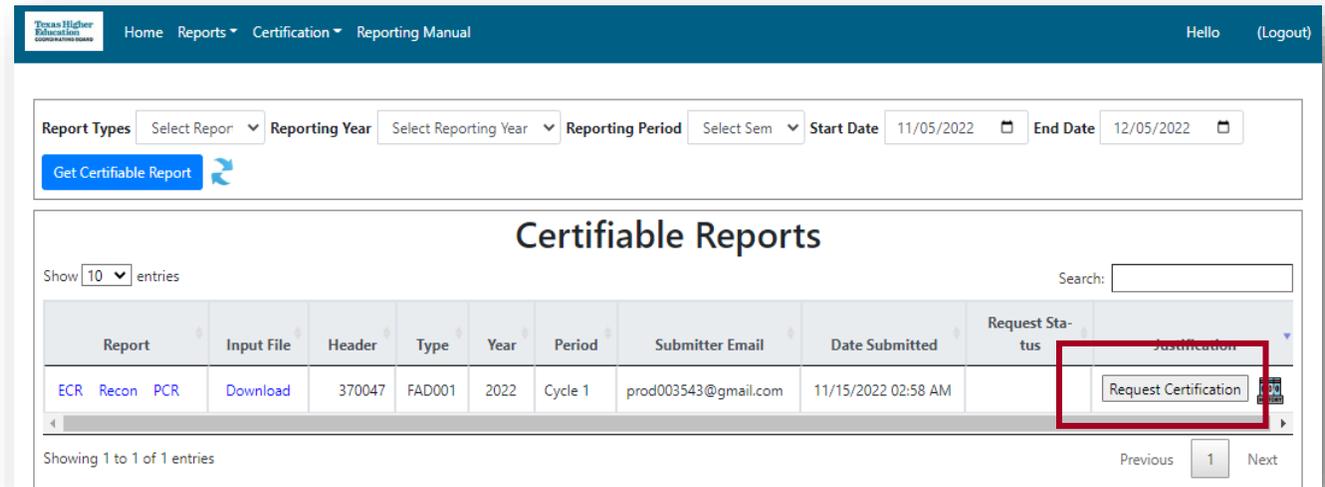


Justifications

Justification (Override) Process



The justifications feature in the submission portal allows institutions to send override explanations for **all report errors simultaneously** without sending individual emails. Any errors that **do not** require a justification (override) must first be cleared in the file.



Justifications



Texas Higher Education Consolidated Data | Home | Reports | Certification | Reporting Manual | Hello | .ogout)

Use this space to summarize your privacy and cookie use policy. [Learn More.](#) Accept

Certification request for FAD001 - 2022 Cycle 2

Error Item Justifications

Item Name	Rule ID	Rule Message	Number of Students	Justification
LastName	FAD001-134	no special characters	551	<input type="text" value="null"/> Maximum allowed 2000 characters only
FirstName	FAD001-136	no special characters	80	<input type="text" value="null"/> Maximum allowed 2000 characters only
EnrollmentStatus	FAD001-145	=1 and classification (#33) = 1 or 5 and attempted hours for Fall (#99) or Spring (#100) or Summer (#101) semester < 12 and exception code <> 05, 15	4417	<input type="text" value="null"/> Maximum allowed 2000 characters only
EnrollmentStatus	FAD001-146	=2 and classification (#33) = 1 or 5 and attempted hours for	4631	<input type="text" value="null"/>



Justifications continued

Use the *optional* **Other Justifications** box to provide further comments on the justifications submitted.

Other Justifications:

This is an example

Maximum allowed 2000 characters only

The *optional* **Browse** button allows the institution to upload supporting documentation needed for the justification process.

Select file to upload

select file

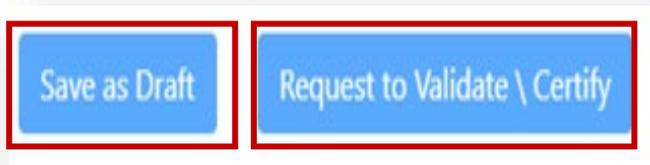
Browse Cancel



Justifications continued

At any time, users can save their work on this page by clicking Save as Draft at the bottom of the page.

When all justifications are complete, click Request to Validate/Certify to be directed to the validation page.



Date: 23-08-2022 **FICE Code: 012015** **Institution: Austin Community College**

VALIDATION

By submitting this form, you are confirming the information provided to you in the latest edit report is accurate. When you complete the validation form and click submit, we will consider it to be your confirmation of the data and you will have met your reporting requirements for the first/second cycle.

NOTE: If any data during the first and/or second cycle is found to be incorrect after you have submitted your validation, you will be unable to resubmit your database report. Corrections should be made to the data in the following cycle. During the third cycle, all data must be corrected and accurate to be certified.

* *

Validating Name Title

Email Phone

I hereby confirm that the student-by-student data provided to the Coordinating Board is valid and all items marked as "Review" accurately reflect the activities in our office for the academic year.

Your request for the following report - FICE Code: 003632 and Report Type: FAD001 - Report Year: 2022 - Cycle 2 has been submitted for certification

Validating/Certifying Reports

Data Submission Portal



Certifying Reports



Validating/Certifying

The screenshot shows the top navigation bar of the Data Submission Portal. The 'Certification' menu item is highlighted with a red box, and a red arrow points to its dropdown menu. The dropdown menu contains three items: 'Request to Certify' (highlighted with a red box), 'Pending Certification', and 'Certified Reports'. The main content area below the navigation bar says 'Welcome to the Data Submission Portal!' and provides contact information for John Dinning.

The screenshot shows a 'VALIDATION' form window. At the top, it displays 'Date: 23-08-2022', 'FICE Code: 012015', and 'Institution: Austin Community College'. Below this is a blue header with the word 'VALIDATION'. The main text area contains a confirmation message and a note about data accuracy. The form includes input fields for 'Validating Name' and 'Title', an 'Email' field with the value 'thecbtest@yahoo.com', and a 'Phone' field with a placeholder '(xxx) xxx xxxx'. There is a checkbox for confirming the data's validity. At the bottom right, there are three buttons: 'Close', 'Reset', and 'Submit', which are highlighted with a red box.

The institution will receive an email notification once the file is error-free and the validation/certification process can be started in CBPass.

A green confirmation message box with a white border. The text inside reads: 'Your request for the following report - FICE Code: 003632 and Report Type: FAD001 - Report Year: 2022 - Cycle 2 has been submitted for certification'. Below the message is a blue button labeled 'Back to Results'.

Notifications and Deadlines

Notifications and Deadlines

Recent Notifications

- TEXAS Grant and TEOG Award Amounts – Jan. 19
- FORWARD Guidelines – Feb. 24

Upcoming Notifications

- Updated Spring Institutional Calendar
- Authority to Transfer
- TEG Award Amounts

Deadlines

- Transfer Grant – Reimbursement Request Spring 2023 – Feb 28 (target date)
- Opt In/Out (EAE, TCWS, WSMP) – March 3
- Good Neighbor Program – March 15
- TEG Engagement Report FY 2022 – April 15

Contact Student Financial Aid Programs

The following phone lines are available for borrowers and the public:

Borrower Services

- Student Borrowers (Cosigners): (800) 242-3062

Texas Financial Aid Information Center

- Public Line: (888) 311-8881

Contact Financial Aid Services in one of the following ways:

FAS Institutional Phone Line

- Institutions Only: (844) 792-2640

Submit inquiries online through the [CONTACT US](#) web form.



**Phone Line
Hours of Operation:
Mon-Fri
8 a.m. to 5 p.m.
(Closed 12-1 daily)**

Submit a CONTACT US

To ensure inquiries are routed correctly, complete these steps:

- Select “**Institution**” in *Received From* box.
- Enter the institution’s full name.
- Always select “**Financial Aid Question**” as the Contact Reason.
- Describe your inquiry in 4000 characters or less.

Provide the best **direct phone number** to reach you.

Texas Higher Education Coordinating Board

Contact Us

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

Received From*

Institution

Contact Reason*

Description* 4000 characters max

Please do NOT include your full Social Security Number inside the issue description. If you have a question about the status of a new loan application, accounts in repayment, or deferments, please use the last four digits of your SSN instead.

Is this a complaint No Yes

Contact Preference E-MAIL LETTER PHONE

Salutation*

First Name*

Last Name*

E-mail*

Phone (10-digit) **Phone Ext**

Mail Address

Mail Address2

Mail Address3

City

State **Zip Code (5-digit)**

| [Help](#)



Texas Higher Education

COORDINATING BOARD

Questions?