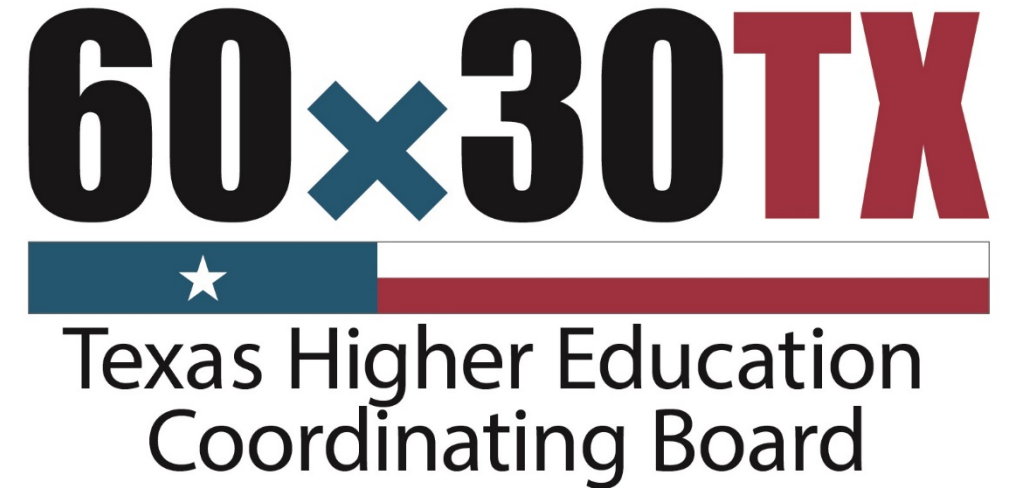


State Financial Aid Webcast

Leah Smalley
Student Financial Aid Programs
August 13, 2019



Agenda Topics

- Requesting Funds
 - Grant Payment Demo
 - Funds Request Form
- Award History Process
- Program Updates
 - EAE
 - TCWS
 - WSMP
- Proposed TAC Rule Changes
- 2020-21 TASFA
- Upcoming Events and Deadlines



Requesting Funds

New Grant Payment System



Institutions can now request grant funds through the New Grant Payment System.

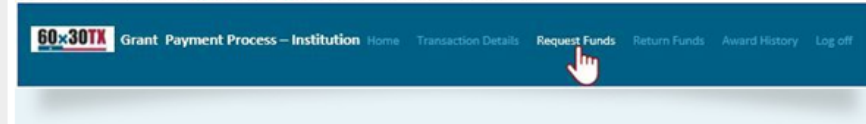
Follow these four easy steps to request funds for:
TEXAS Grant, TEOG or TEG

Step 1. Log in to [CBPass](#) and select **Grant Payment** from MY ACCESS webpage.



App ID	Application Name
139	Financial Aid Data Certification
130	Good Neighbor Scholarship Program
123	Grant Payment
138	Integrated Fiscal Reporting System

Step 2. Select **Request Funds** from navigation bar.



Step 3. Enter **Request Amount** and **Student Count**.

Step 4. Click **Submit Request**.

Total Allocation : \$ XX,XXX,XXX

Total Remaining Allocation: \$ XX,XXX,XXX

Appropriation year:

2020

Program Type:

Grant Program Name

Request Amount:

*Student Count:

Back to Home

Submit Request




Watch a live demonstration of the **New Grant Payment System** during the August 13, 2019, webcast hosted by Financial Aid Services. Look for webcast details on the SFAP webpage under Stay Connected.

Training and additional resource documents will be available soon.

Web Inquiry: [CONTACT US](#) (Select "Financial Aid Question" as the Contact Reason)

New Grant Payment System



Grant Payment Process - Institution

[Home](#) [Transaction Details](#) [Request Funds](#) [Return Funds](#)

OFFICE Name: THECB UNIVERSITY

7/8/2019 1:28:41 PM

Appropriation Year:

2020

Allocation Summary

Total Allocation	\$200,000.00
Available Allocation	\$158,800.00
Total Student Count	11

Payment / Returned

PAYMENTS

Pending Review:	\$41,200.00
Disbursed:	\$0.00

REFUNDS

Pending Review:	\$21,000.00
Received:	\$0.00

Funds Request Form



2019-20 (FY 2020) Educational Aide Exemption Funds Request Form

Date:	FICE Code:	Institution:	
Contact Information			
Position	Name	Email	Phone
Financial Aid Director			
Reporting Financial Aid Officer			
Business Office Contact			
Current Request			
Type of Program	Current amount being requested	Number of unique student awards being funded via current request*	
Educational Aide Exemption			
By submitting this form, I certify that the amounts reported on this request form are accurate as of today's date. I further understand the importance of the accuracy of this information, as it may be reported to the Texas Legislature and is subject to review during a program audit.			
Certifying Name and Title			
Signature		Date	
<input type="radio"/> I confirm that this is an original (not a duplicate) submission.			
<input type="radio"/> I confirm that this is a revised request; below is the date of the original submission and the reason for the revision.			
Date of Original Submission:			
Enter the explanation for the revised form here.			
Year-to-Date Totals			
Total Educational Aide Exemption Allocation	Year-to-date amount requested including current request**	Number of year-to-date distinct student awards funded including current request***	
* The count of recipients receiving program funds for the first time this award year via this current request. ** The cumulative total amount of funds requested this fiscal year, including this request. *** The total number of distinct students who have received funds this fiscal year, including those who will receive funds from this request.			

To send the completed form:

- Click the **SUBMIT** button.
 - An email with this form attached will open in a new window.
- Enter the six-digit FICE code and file name in the subject line.
 - Example: 012345_EAE Funds Request Form FY 2020.
- Click the **SEND** button to submit the form.

Submit

Forms that cannot be sent using the SUBMIT button should be manually completed, scanned, and emailed to FASOperations@thecb.state.tx.us.



Bilingual Education Scholarship Funds Request Form

Date:	FICE Code:	Institution:	
Contact Information			
Position	Name	Email	Phone
Financial Aid Director			
Reporting Financial Aid Officer			
Business Office Contact			
Current Request			
Type of funds	Current amount being requested	Number of unique students awards being funded via current request*	
Grants/Scholarships			
Other Associated Cost			
By submitting this form, I certify that the amount requested and the number of recipients (both new and year-to-date) as reported on this request form are accurate as of today's date. I further understand the importance of the accuracy of this information, as it may be reported to Legislatures and is subject to review during a program audit. In addition, when requesting funds for associated cost, an itemized list with dollar amounts will be provided along with this request.			
Certifying Name/ Title			
Signature		Date	
<input checked="" type="radio"/> I confirm that this is an original (not a duplicate) submission.			
Total Funds			
Total Bilingual Education Scholarship Allocation	Year-to-date requested in current request		
* The count of recipients receiving program funds for the first time this award year via this current request. ** The cumulative total amount of funds requested this fiscal year including this request. *** The total number unique students who have received funds this fiscal year including those who will receive funds from this request.			

To send the completed form:

- Click the **SUBMIT** button.
 - An email with this form attached will open in a new window.
- Enter the six-digit FICE code and file name in the subject line.
 - Example: 012345_ Bilingual Education Funds Request Form FY 2019.
- Click the **SEND** button to submit the form.

Submit

Forms that cannot be sent using the SUBMIT button should be manually completed, scanned and emailed to FASOperations@thecb.state.tx.us.

2019-20 Change:
Other Associated Costs Removed

Award History



Award History File Instructions

Student Financial Aid Programs
Texas Higher Education Coordinating Board

Award History Options

Option A Log into CBPass

CBPass Login

Sign in with your CBPass Account

*Username:

*Password:

[Sign In](#)

[Forgot your Username or Password?](#)

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

TEXAS Grant

- To view all the students at your institution, click on "View All"
- OR
- To view all the students at your institution who have received the TX Grant, click on "View"
- OR
- To search for a particular student by SSN, enter their SSN and click on "Search by SSN"
- OR
- To search for a particular student by Name and Birthdate, enter their First Name, Last Name, and Birthdate (*all three fields are required) and click on "Search by Name and Birthdate".

Sort list by: [View All](#)

Students who have received the TX Grant award for 125 hours or greater [View](#)

SSN 1:	<input type="text"/>
SSN 2:	<input type="text"/>
SSN 3:	<input type="text"/>
SSN 4:	<input type="text"/>
SSN 5:	<input type="text"/>
SSN 6:	<input type="text"/>

[Search by SSN](#)

First Name:

Last Name:

Birthdate (mm/dd/yyyy):

[Search by Name and Birthdate](#)

Option B Submit a file using MOVEit

60x30TX
Texas Higher Education Coordinating Board

Home Folders Logs Search Find File/Folder Go To Folder...

Selected File/Folder Action

Delete

Destination Folder...

Copy Move Advanced Copy/Move Options >>

Upload a File

Select a folder: / Home /

Choose a file: Browse...

Enter any notes:

Upload

The results will display all relevant and available program eligibility information.

TEXAS Grant	StudentID	DOB	First Name	Last Name	Hrs YTD	IY	IYS	L_Year	L_FICE	L_MetSAP	L_HrAttempted
	999999996,	4/25/1999,	Raul	,Phong	,38	,2018	,1	,2018	,001127	,Y	,24
	999999997,	4/26/1999,	Mark	,Martin	,66	,2018	,2	,2018	,001128	,Y	,18

TEOG	StudentID	DOB	First Name	Last Name	Hrs YTD	IY	IYS	L_Year	L_FICE	L_MetSAP	L_HrAttempted
	999999993,	4/22/1999,	Sahira	,Smith	,75	,2016	,1	,2017	,001124	,Y	,24
	999999994,	4/23/1999,	Jeniffer	,Johnson	,30	,2016	,1	,2016	,001125	,N	,18

TEG	StudentID	DOB	First Name	Last Name	IY	IYS	L_Year	L_FICE	L_MetSAP	L_HrAttempted	L_Degree
	999999991,	4/20/1999,	Fransico	,Lopez	,2016	,1	,2018	,001122	,Y	,15	4
	999999992,	4/21/1999,	Lisa	,Rodriguez	,2016	,2	,2016	,001123	,Y	,12	B

Program Updates

Educational Aid Exemption (EAE)

Shortage areas are published annually online by the Department of Education.

<https://tsa.ed.gov/#/home/>

Questions on shortage areas or teacher certification programs should be directed to the Texas Education Agency (TEA).

<https://tea.texas.gov/>

2019-20 Critical Shortage Areas

Subject Matter Discipline	Grades
English as a Second Language	Pre-K through 12
English as a Second Language/ Bilingual Education	Pre-K through 12
Career and Technical Education	7, 8, 9, 10, 11, 12
Career and Technical Education/ Computer Science	7, 8, 9, 10, 11, 12
Special Education	Pre-K through 12
Mathematics	7, 8, 9, 10, 11, 12

TCWS Off-Campus Requirement

House Bill 3808 created Texas WORKs, a centralized paid internship program at the THECB using existing Texas College Work-Study (TCWS) funding.

- The bill also repealed Section 56.076(b), which requires institutions to ensure that at least 20%, but no more than 50%, of the employment positions through TCWS are provided by off-campus employers. This repeal is **effective Summer 2020**.
- For the 2019-20 award year, institutions participating in TCWS must continue meeting the off-campus requirement.

Work-Study Student Mentorship Program (WSMP)



2019-2020 Program Guidelines Work-Study Student Mentorship Program (WSMP)



Division of College Readiness and Success
Texas Higher Education Coordinating Board

Work-Study Student Mentorship Program (WSMP)

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.

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:

$$10,000 \text{ (COA)} - 3,000 \text{ (EFC)} = \$7,000 \text{ (Financial Need)}$$

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:

$$10,000 \text{ (COA)} - 15,000 \text{ (EFC)} = -\$5,000 \text{ (No Financial Need)}$$

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

Proposed TAC Rule Changes

www.sos.texas.gov/texreg/index.shtml

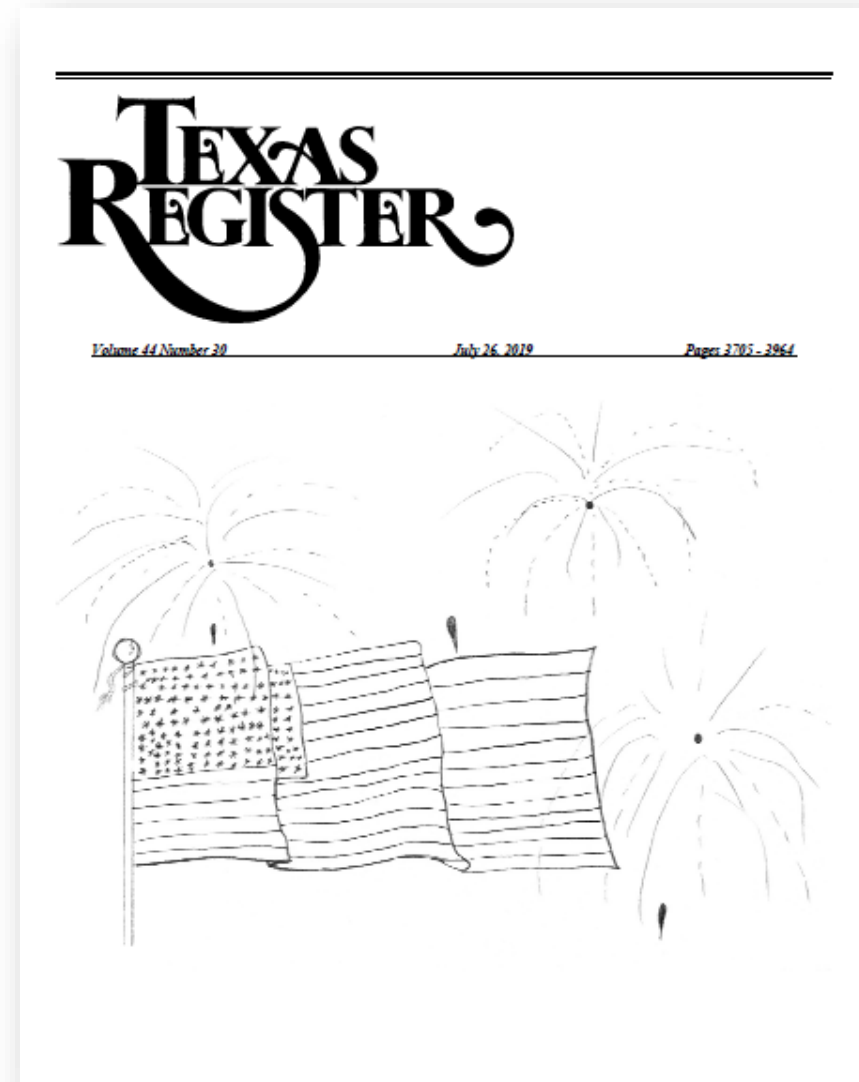
Edition: July 26, 2019

Deadline: August 25, 2019
(30 days from publication)

Comments/Questions:

Contact Charles Puls

Charles.puls@thecb.state.tx.us



<https://www.sos.texas.gov/texreg/pdf/backview/0726/0726is.pdf>

2020-21 TASFA

2020-21 TASFA

Texas Application for State Financial Aid

July 1, 2020 – June 30, 2021

The Texas Application for State Financial Aid (TASFA) collects information to help determine eligibility for state (or institutional) financial aid programs administered by institutions of higher education in the state of Texas. Students classified as Texas Residents who are not eligible to apply for federal financial aid using the Free Application for Federal Student Aid (FAFSA) are encouraged to complete the TASFA. To review the FAFSA filing requirements, visit www.fafsa.ed.gov or visit the financial aid office at the institution you plan to attend for the 2020-21 award year. **Note:** The federal application covers federal and state financial aid opportunities. If you meet the FAFSA filing requirements, then you should submit a completed FAFSA. You do not need to complete both the FAFSA and TASFA applications.

Note: Texas residency and final eligibility for state aid can only be determined by the institution that you plan to attend.

To complete this application, each item within the applicable sections must be answered. **For clarification on specific items, please reference the TASFA Notes on pages 6-8. If you have further questions, contact the financial aid office at your institution.**

The Texas state priority deadline for many institutions of higher education is **January 15, 2020** for the 2020-21 award year. It is recommended that applicants complete and submit this application and any other required documentation to the financial aid office on or before January 15.

STEP ONE: STUDENT INFORMATION (See Notes for questions 5-6)			
1. Last Name	2. First Name	3. M.I.	
4. Date of Birth	5. Social Security Number or DACA # or Not Applicable []	6. Student ID #	
7. Permanent Mailing Address			
8. City	9. State	10. Zip Code	Phone Number
12. Email Address		Alternate Email:	
13. What will your high school diploma be when you begin college in the 2021 school year?		Homeschooled [] (Skip to Question 14) General Educational Development (GED) certificate [] (Skip to Question 14) None of the above [] (Skip to Question 14)	
14. High School Name (If applicable)			
15. High School City (If applicable)		16. HS State (If applicable)	17. Date of Graduation (HS or GED)
18. Will you have your first bachelor's degree when you begin the 2020-21 school year? [] Yes [] No			
19. What will your college grade level be when you begin the 2020-21 school year?		20. What degree or certificate will you be working on when you begin the 2020-21 school year?	
Never attended college (No college credits)		1st bachelor's degree	
1st year undergraduate		2nd bachelor's degree	
2nd year undergraduate/sophomore		Associate degree (occupational, technical, general education, or transfer program)	
3rd year undergraduate/junior		Certificate or diploma	
4th year undergraduate/senior		Teaching credential (nondegree program)	
5th year/other undergraduate		Graduate or professional degree	
1st year graduate/professional		Other/undecided	
Continuing graduate/professional or beyond			

Question 19

The 2020-21 TASFA will no longer include credit-hour ranges in Question 19.

Feedback from institutions indicated that the additional information did not help with processing the application.

19. What will your college grade level be when you begin the 2019-20 school year?

Never attended college

(No college credits)

1st year undergraduate

(Up to 30 college credits toward degree)

2nd year undergraduate

(30-60 college credits toward degree)

3rd year undergraduate

(60-90 college credits toward degree)

4th year undergraduate

(90-120 college credits toward degree)

5th year/other undergraduate

(120 or more college credits toward degree)

1st year graduate/professional

Continuing graduate/professional

19. What will your college grade level be when you begin the 2020-21 school year?

Never attended college

(No college credits)

1st year undergraduate

2nd year undergraduate/sophomore

3rd year undergraduate/junior

4th year undergraduate/senior

5th year/other undergraduate

1st year graduate/professional

Continuing graduate/professional or beyond

Untaxed Income

Question 68 was updated to align with FAFSA.
Question 71 was added to align with FAFSA.

For questions, 67-71, if the answer is zero or the question does not apply to you, enter "0." DO NOT LEAVE ANY BLANKS. Report whole dollar yearly amounts with no cents.	STUDENT	SPOUSE (If applicable)	PARENT 1	PARENT 2 (If applicable)
PART B. 2018 UNTAXED INCOME (See Notes for questions 67-72)				
67. Child support received for any of your children.				
68. Housing, food and other living allowances paid to members of the military, clergy and others (See notes).				
69. Other untaxed income not reported. (Such as worker's compensation, disability, veterans noneducation benefits, etc.)				
70. Cash earnings. (Wages not listed on taxes or W-2 forms)				
71. Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form).			N/A	N/A
72. TOTAL UNTAXED INCOME				

Federal Assistance Programs

N/A option added to each program.

79. At any time during 2018 or 2019, did you, (your spouse), your parents, anyone in your household, or anyone in your parents' household receive benefits from any of the federal programs listed?

Mark all that apply or mark N/A.

☐ Medicaid or Supplemental Security Income (SSI)

☐ N/A

☐ Supplemental Nutrition Assistance Program (SNAP)

☐ N/A

☐ Free or Reduced Price School Lunch

☐ N/A

☐ Temporary Assistance for Needy Families (TANF)

☐ N/A

☐ Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)

☐ N/A

Question 82

Note added under certification statement instructs students to print and sign copies if applying at multiple schools.

82. I certify that I will use state student financial aid to pay only the cost of attending an institution of higher education, and that the information provided on this form is true, complete, and correct to the best of my knowledge. I understand that any false statements may void my eligibility for state financial aid. I also understand that the information provided on this form will be used only for evaluation of eligibility for state (or institutional) financial aid and that I may need to provide additional information for my school to determine eligibility.

Student Signature _____

Date _____

Parent Signature* _____

Date _____

*Only required if all questions in **STEP TWO** were answered “No”.

Mark which parent signed above.

Parent 1 ☐ Parent 2 ☐

Note: If you plan to submit your TASFA to multiple institutions, make copies of the completed form and sign each copy.

Selective Service Statement

- ✓ The TASFA will include the **Selective Service Registration Status** statement.
- ✓ The statement will include additional options for students to designate their current status.

STUDENT INFORMATION CONTINUED... (See Notes for questions 24-29)

21. Where do you plan to live during the 2020-21 school year?
☐ On-campus ☐ Off-campus ☐ With parent or relative

22. At the start of the 2020-21 school year, how many credits/hours will you be enrolled in?
☐ Full-time (12 hours or more) ☐ Three-quarter time (9-11 hours)
☐ Half-time (6-8 hours) ☐ Less than half-time (5 hours or less)
☐ Not sure

23. If you are transferring schools, have you earned an Associate Degree?
☐ Yes (Enter date you earned Associate Degree: ____/____/____)
☐ No

24. Were you born male or female?
☐ Male
☐ Female

25. Have you been convicted of a felony or a crime involving a controlled substance?
☐ Yes ☐ No

26. Have you previously received state Financial Aid?
☐ Yes ☐ No

27. (A) Are you interested in being considered for the Texas College Work-Study program?
☐ Yes ☐ No ☐ Don't know
(B) If yes, do you have authorization to work in the U.S.? ☐ Yes ☐ No ☐ Don't know ☐ N/A

28. What is your current marital status?
☐ I am single ☐ I am married ☐ I am widowed
☐ I am divorced ☐ I am separated

29. Month and year you were married, separated, divorced or widowed. Month: ____ Year: ____ ☐ N/A

*Individuals who were born male must complete the following section.

SELECTIVE SERVICE STATEMENT OF REGISTRATION
Male students must verify their current Selective Service registration status by marking one of the statements below. Failure to submit your Selective Service registration status with your current institution may result in the loss of all federal financial aid.

☐ I am under the age of 18 and not currently required to register.

☐ I am **REGISTERED** with the Selective Service and:
Check the following box that best describes your registration status:
☐ I have already submitted proof of my registration to my current institution.
☐ I have already submitted proof of my exemption to my current institution.
☐ I have not yet submitted proof of my registration or exemption to my current institution.

☐ I am **NOT REGISTERED** with the Selective Service and:
Check the following box that best describes your registration status:
☐ I have already submitted proof of my registration to my current institution.
☐ I have already submitted proof of my exemption to my current institution.
☐ I have not yet submitted proof of my registration or exemption to my current institution.

STEP TWO: CURRENT DEPENDENCY STATUS STATEMENT (See Notes for questions 30 and 35-40)

30. Were you born before January 1, 1977? ☐ Yes ☐ No

31. As of today, are you married? (Answer "Yes" if you are separated but not divorced.) ☐ Yes ☐ No

32. At the beginning of the 2020-21 school year, will you be working on a master's or doctorate program? (e.g., MA, MBA, etc.) ☐ Yes ☐ No

33. Do you now have dependent children who will receive more than half of their support from you between July 1, 2020 and June 30, 2021? ☐ Yes ☐ No

34. Do you have dependents (other than your children or spouse) who live with you and who receive more than half of their support from you, now and through June 30, 2021? ☐ Yes ☐ No

35. At any time since you turned age 18, were you in foster care, were you a dependent or ward of the court, or were both your parent(s) deceased? (You do not have to currently be a ward of the court.) ☐ Yes ☐ No

36. As determined by the state's court, are you or were you an emancipated minor? ☐ Yes ☐ No

37. As determined by the state's court, does someone other than your parent or stepparent have legal guardianship of you? ☐ Yes ☐ No

38. At any time on or after July 1, 2019, did your high school or school district's homeless liaison determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless? ☐ Yes ☐ No

39. At any time on or after July 1, 2019, did the director of an emergency shelter or transitional housing program, funded by the U.S. Department of Housing and Urban Development, determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless? ☐ Yes ☐ No

40. At any time on or after July 1, 2019, did the director of a runaway or homeless youth basic center or transitional living program determine that you were an unaccompanied youth who was homeless or were self-supporting and at risk of being homeless? ☐ Yes ☐ No

ANY
QUESTIONS
?

Important Dates

Important Dates



August 1, 2019

- Begin requesting 2019-20 funds

August 19, 2019

- FAD Report Cycle Two Validation Deadline

August 29, 2019

- TCWS Data Request Deadline

September 2, 2019

- Comptroller's office closed for Labor Day

September 10, 2019

- Monthly FAS webcast

TCWS Data Request - Deadline August 29, 2019

ABILENE CHRISTIAN UNIVERSITY	LONE STAR COLLEGE SYSTEM DIST.	TEXAS SOUTHMOST COLLEGE
ALVIN COMMUNITY COLLEGE	LUBBOCK CHRISTIAN UNIVERSITY	TEXAS STATE T. C. WACO
ANGELINA COLLEGE	MCLENNAN COMMUNITY COLLEGE	TEXAS WESLEYAN UNIVERSITY
BAYLOR UNIVERSITY	MIDLAND COLLEGE	TYLER JUNIOR COLLEGE
BRAZOSPORT COLLEGE	NORTH CENTRAL TEXAS COLLEGE	U. OF HOUSTON-CLEAR LAKE
CLARENDON COLLEGE	NORTHEAST TEXAS COMM COLLEGE	U. OF HOUSTON-DOWNTOWN
COASTAL BEND COLLEGE	ODESSA COLLEGE	U. OF HOUSTON-VICTORIA
DALLAS BAPTIST UNIVERSITY	PARIS JUNIOR COLLEGE	U. OF TEXAS AT AUSTIN
EAST TEXAS BAPTIST UNIVERSITY	SAM HOUSTON STATE UNIVERSITY	U. OF TEXAS AT DALLAS
EL PASO COMMUNITY COLLEGE DIST	SOUTHERN METHODIST UNIVERSITY	U. OF TEXAS AT EL PASO
GRAYSON COLLEGE	SOUTHWESTERN ADVENTIST UNIV	U. OF TEXAS-RIO GRANDE VALLEY
HARDIN-SIMMONS UNIVERSITY	SOUTHWESTERN ASSEM OF GOD UNIV	UNIV OF MARY HARDIN-BAYLOR
HILL COLLEGE	ST. EDWARD'S UNIVERSITY	UNIVERSITY OF HOUSTON
HOUSTON COMMUNITY COLLEGE	STEPHEN F. AUSTIN STATE UNIV	UNIVERSITY OF NORTH TEXAS
HOWARD COLLEGE	TAMUS HSC-BAYLOR CL DENTAL SCH	UT MEDICAL SCHOOL SAN ANTONIO
JACKSONVILLE COLLEGE	TEXAS A&M UNIV AT GALVESTON	VERNON COLLEGE
LAMAR UNIVERSITY	TEXAS A&M UNIVERSITY	WEST TEXAS A&M UNIVERSITY
LAREDO COLLEGE	TEXAS A&M UNIVERSITY-COMMERCE	WHARTON COUNTY JUNIOR COLLEGE
LEE COLLEGE	TEXAS LUTHERAN UNIVERSITY	

Financial Aid Services

Institutional Toll-Free Number

(844) 792-2640

Monday - Friday
8 a.m. - 5 p.m.



Contact Information and Feedback

Email: leah.smalley@thecb.state.tx.us

Webcast Survey: <https://www.surveymonkey.com/r/58YRM92>

**Financial Aid Services Phone Line
(Institutions):** 844-792-2640

**Texas Financial Aid Information Center Phone Line
(Students):** 888-311-8881