

State Financial Aid Monthly Webcast

March 27, 2024

Topics of Discussion



Online TASFA
Updates

Overview of Texas
Transfer Grant and
Texas First Program

GAPP Transfer
Request Process

Deadlines &
Reminders

Questions?

2024-25 Texas Application for State Financial Aid (TASFA)

Updates

FAFSA vs. TASFA

Free Application for Federal Student Aid – FAFSA

Students who can apply are:

- U.S. citizens
- Permanent U.S. residents
- Eligible noncitizens
- Find the FAFSA application at studentaid.gov

Texas Application for State Financial Aid – TASFA

Students who can apply are typically:

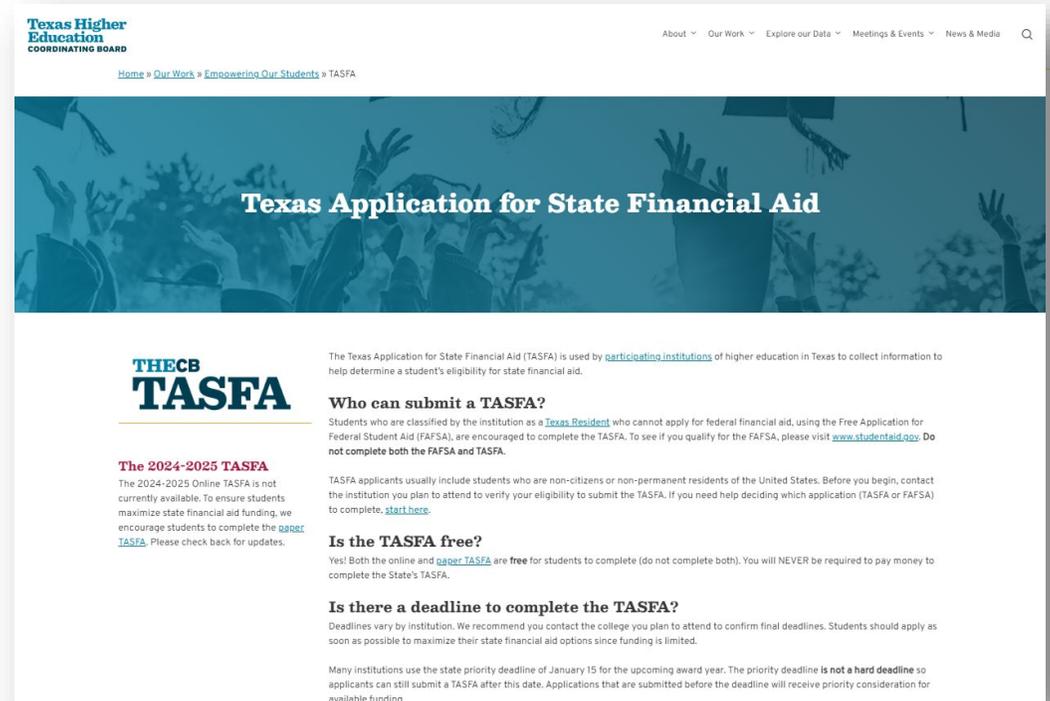
- Texas residents who are not eligible to complete the FAFSA
- Find the TASFA application on the [College for All Texans website](https://www.collegeforalltx.com/) and at <https://www.highered.texas.gov/our-work/empowering-our-students/tasfa/>

Applying for State Aid

- Grants
- Scholarships
- Loans
- Work-Study

2024-25 TASFA

- The TASFA incorporates FAFSA updates.
- The Online TASFA form is available!
- The paper TASFA remains available for students unable to fill out the Online TASFA.
- All institutions participating in state financial aid are required to receive online and paper TASFAs.



TASFA website: <https://www.highered.texas.gov/our-work/empowering-our-students/tasfa/>

2024-25 TASFA Changes

Removed Questions

- Payments to tax-deferred pension and retirement savings plans
- Child support paid
- Taxable earnings from need-based employment programs, such as Federal
- Work-Study and need-based employment portions of fellowships and assistantships
- Combat pay or special combat pay
- Earnings from work under a cooperative education program.
- Housing, food, and other living allowances paid to members of the military, clergy, and others
- Veterans noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work Study allowances
- Other untaxed income not reported such as workers' compensation, disability benefits, and untaxed foreign income not earned from work
- Money received, or paid on your behalf (e.g., bills)
- Dislocated worker

32. STUDENT 2021 ADDITIONAL FINANCIAL INFORMATION	
a.	Education credits (American Opportunity Tax Credit and Lifetime Learning Tax Credit) from IRS Form 1040 Schedule 3—line 3.
✘ b.	Child support paid because of divorce or separation or as a result of a legal requirement. Don't include support for children in your household.
✘ c.	Taxable earnings from need-based employment programs, such as Federal Work-Study and need-based employment portions of fellowships and assistantships.
d.	Taxable college grant and scholarship aid reported to the IRS as income . Includes AmeriCorps benefits (awards, living allowances and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.
✘ e.	Combat pay or special combat pay. Only enter the amount that was taxable and included in your adjusted gross income.
✘ f.	Earnings from work under a cooperative education program offered by a college.

33. STUDENT 2021 UNTAXED INCOME	
✘ a.	Payments to tax-deferred pension and retirement savings plans (paid directly or withheld from earnings).
b.	IRA deductions and payments to self-employed SEP, SIMPLE, Keogh and other qualified plans from IRS Form 1040 Schedule 1—total of lines 16 + 20.
c.	Child support received for any of your children. Don't include foster care or adoption payments.
d.	Tax exempt interest income from IRS Form 1040—line 2a.
e.	Untaxed portions of IRA distributions and pensions from IRS Form 1040—(lines 4a + 5a) minus (lines 4b + 5b). Exclude rollovers . If negative, enter a zero here.
✘ f.	Housing, food and other living allowances paid to members of the military, clergy and others (including cash payments and cash value of benefits). Don't include the value of on-base military housing or the value of a basic military allowance for housing.
✘ g.	Veterans noneducation benefits, such as Disability, Death Pension, or Dependency & Indemnity Compensation (DIC) and/or VA Educational Work-Study allowances.
✘ h.	Other untaxed income not reported, such as workers' compensation, disability benefits, untaxed foreign income, etc. Also include the untaxed portions of health savings accounts from IRS Form 1040 Schedule 1—line 13.
✘ i.	Money received, or paid on your behalf (e.g., bills), not reported elsewhere on this form. This includes money that you received from a parent or other person whose financial information is not reported on this form and that is not part of a legal child support agreement.

Added Questions

- Spouse last and first name (#19 and #20).
- Pensions and rollovers - Student and Parent (#39, #41, #90, and #92).
- Net Profit loss - Student and Parent section (#42 and #93).
- Foreign earned income exclusion - Student and Parent (#43 and #94).

39. IRA rollover into another IRA or qualified plan.	
40. Untaxed portions of pensions from IRS Form 1040—line 5a minus 5b.	
41. Pension rollover into an IRA or other qualified plan.	
42. Net profit or loss from IRS Form 1040—line 31 of Schedule C.	
43. Foreign earned income exclusion from IRS Form 1040—line 8d of Schedule 1.	

27. Did (or will) you file a Schedule A, B, D, E, F or H with your 2022 tax return?

Yes
 No
 Don't Know

PARENT 2 (IF APPLICABLE)			
66. Last Name		67. First Name	
68. Date of Birth		69. What is your Parent 2's Social Security Number (SSN), Individual Taxpayer Identification Number (ITIN), Deferred Action for Childhood Arrivals (DACA) number?	<input type="checkbox"/> N/A
70. Phone Number		71. Email Address	
72. Highest level of education completed: <input type="checkbox"/> Middle School/Jr. High <input type="checkbox"/> High School <input type="checkbox"/> College or Beyond <input type="checkbox"/> Other/Unknown			

Updated Questions

- Choices for student and parent marital status (#17 and #57).
- Choices for student and parent filing status (#26 and #77).
- Dependent and dependent children in dependency section (#49 and #50).
- Determining student as an unaccompanied youth as homeless (#54, #55, and #56).
- Federal benefits received by adding coverage under a qualified health plan (QHP), Earned Income Tax Credit (EIC), and Federal Housing Assistance (#95, #100, and #101).
- Child Support moved to Assets section - Student and Parent section (#33 and #84).

17. What is your marital status as of today?

<input type="checkbox"/> Single (never married)	<input type="checkbox"/> Separated
<input type="checkbox"/> Married (not separated)	<input type="checkbox"/> Divorced
<input type="checkbox"/> Remarried	<input type="checkbox"/> Widowed

26. What is or will be your tax filing status for 2022?

<input type="checkbox"/> Single	<input type="checkbox"/> Head of Household
<input type="checkbox"/> Married filing jointly	<input type="checkbox"/> Married filing separately
<input type="checkbox"/> Qualifying surviving spouse	

95. Medicaid, including the Children's Health Insurance Program (CHIP), Supplemental Security Income (SSI), or refundable credit for coverage under a qualified health plan (QHP)
96. Supplemental Nutrition Assistance Program (SNAP) benefits, also known as food stamps
97. Free and Reduced-Price School Lunch Program
98. Temporary Assistance for Needy Families (TANF) - may use a different name in different states
99. Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)
100. Earned Income Credit (EIC)
101. Federal Housing Assistance

STUDENT ASSETS	
30. As of today, what is your (and spouse's) total current balance of cash, savings, and checking accounts? <i>Don't include student financial aid.</i>	
31. As of today, what is the net worth of your (and spouse's) investments, including real estate? <i>Don't include the home you live in. Net worth is the value of the investments minus any debts owed against them.</i>	
32. As of today, what is the net worth of your (and spouse's) current businesses and/or investment farms? <i>Enter the net worth of the student's businesses or for-profit agricultural operations. Net worth is the value of the businesses or farms minus any debts owed against them.</i>	
33. Child support received for any of your children. Don't include foster care or adoption payments.	

NEW Family Info Section

SECTION 4: FAMILY INFORMATION

FEDERAL BENEFITS RECEIVED

This information being collected below will be used to help determine eligibility for certain state financial aid options. Information disclosed about federal benefits received is protected from unauthorized distribution to third parties under the Family Educational Rights and Privacy Act (FERPA) of 1974.

At any time during 2022 or 2023, did you or anyone **in your family** (including your spouse or parents, if applicable) receive benefits from any of the federal programs listed? Mark all that apply with Yes, No or Prefer not to answer.

95. Medicaid, including the Children's Health Insurance Program (CHIP), Supplemental Security Income (SSI), or refundable credit for coverage under a qualified health plan (QHP)	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Prefer not to answer
96. Supplemental Nutrition Assistance Program (SNAP) benefits, also known as food stamps	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Prefer not to answer
97. Free and Reduced-Price School Lunch Program	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Prefer not to answer
98. Temporary Assistance for Needy Families (TANF) – may use a different name in different states	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Prefer not to answer
99. Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Prefer not to answer
100. Earned Income Credit (EIC)	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Prefer not to answer
101. Federal Housing Assistance	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Prefer not to answer

NEW Family Info Section

The screenshot displays the Texas Application for State Financial Aid interface. At the top, navigation links include Home, Applications, Help, ¿TASFA en español?, and Texas Application for State Financial Aid. The user is logged in as 'Hi Sailor!'. A left sidebar contains a menu with 'Student' highlighted in a red box. The main content area is titled 'Family Info' and includes a 'Save' button. A section titled 'FEDERAL BENEFIT PROGRAMS' is highlighted in a red box. Below this, a text box explains that the information is used for eligibility and is protected under FERPA. It asks if anyone in the user's family received benefits from federal programs in 2022 or 2023. Below this are five numbered questions (95-100) with radio button options for Yes, No, or Prefer not to answer.

Home Applications Help ¿TASFA en español? Texas Application for State Financial Aid Hi Sailor! (Logout)

Instructions
Student
Dependency
Parent
Family Info
Colleges
Submit

Family Info

◀ Previous Save Next ▶

FEDERAL BENEFIT PROGRAMS

This information being collected below will be used to help determine eligibility for certain state financial aid options. Information disclosed about federal benefits received is protected from unauthorized distribution to third parties under the Family Educational Rights and Privacy Act (FERPA) of 1974. At any time during 2022 or 2023, did you or anyone **in your family** (including your spouse or parents, if applicable) receive benefits from any of the federal programs listed?

Mark all that apply with Yes, No or Prefer not to answer.

95) Medicaid, including the Children's Health Insurance Program (CHIP), Supplemental Security Income (SSI), or refundable credit for coverage under a qualified health plan (QHP)
 Yes No Prefer not to answer

96) Supplemental Nutrition Assistance Program (SNAP) benefits, also known as food stamps
 Yes No Prefer not to answer

97) Free and Reduced-Price School Lunch Program
 Yes No Prefer not to answer

98) Temporary Assistance for Needy Families (TANF) – may use a different name in different states
 Yes No Prefer not to answer

99) Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)
 Yes No Prefer not to answer

100) Earned Income Credit (EIC)
 Yes No Prefer not to answer

[Privacy Policy - Texas Higher Education Coordinating Board](#)

NEW Family Info Section

The screenshot shows the 'Family Info' section of the Texas Application for State Financial Aid. The page has a dark blue header with navigation links: Home, Applications, Help, ¿TASFA en español?, Texas Application for State Financial Aid, and Hi Sailor! (Logout). A left sidebar contains a menu with options: Instructions, Student, Dependency, Parent, Family Info (highlighted), Colleges, and Submit. The main content area is titled 'Family Info' and includes navigation buttons for 'Previous', 'Save', and 'Next'. A red box highlights the 'FAMILY SIZE' section. This section contains instructions for calculating family size based on whether the user answered 'NO' or 'YES' to questions in the Dependency Section (44-56). Below the instructions are two questions: '102) How many people are in your household' and '103) How many people in your household will be college students', each with a corresponding input field. The page ends with 'End of Page' and a footer link for 'Privacy Policy - Texas Higher Education Coordinating Board'.

Home Applications Help ¿TASFA en español? Texas Application for State Financial Aid Hi Sailor! (Logout)

Instructions
Student
Dependency
Parent
Family Info
Colleges
Submit

Family Info Previous Save Next

FAMILY SIZE

If you answer "NO" to all questions in the Dependency Section (44-56), use these instructions to calculate your totals for questions 102 and 103.

- **Total number in family:** Include your parent (and spouse or partner), yourself, your parent's dependent children (even if they live apart because of college enrollment), and other people living with your parent now. Include these dependent children and other people only if your parent will provide more than half of their support between July 1, 2024, and June 30, 2025.
- **Total number in college for 2024-25:** Always count yourself as a college student. **Do not include your parents.**

If you answer "YES" to any question in the Dependency Section (44-56), use these instructions to calculate your totals for questions 102 and 103.

- **Total number in family:** Include yourself (and spouse), your dependent children (even if they live apart due to college enrollment), and other people living with you now. Include these dependent children and other people only if you will provide more than half of their support between July 1, 2024, and June 30, 2025.
- **Total number in college for 2024-25:** Always count yourself as a college student.

102) How many people are in your household

NUMBER OF PEOPLE IN HOUSEHOLD

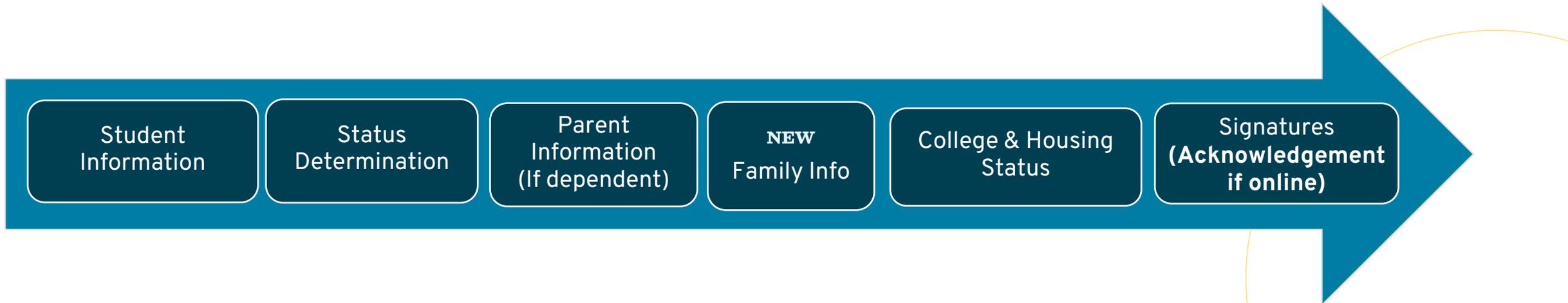
103) How many people in your household will be college students

NUMBER OF PEOPLE IN HOUSEHOLD THAT WILL BE IN COLLEGE

End of Page

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TASFA Flow



2024-25 Online TASFA

New Features

Applications Section

Home Applications Help [¿TASFA en español?](#) Texas Application for State Financial Aid Hi Sailor! (Logout)

The Texas Application for State Financial Aid (TASFA) is a **free** application that 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. If you're not sure which application (TASFA or FAFSA) to complete, use the [TASFA Decision Tool](#).

You do not need to complete both the FAFSA and TASFA.

Contact the college you plan to attend to confirm final deadlines since they can vary. Students should apply as soon as possible to maximize their state financial aid options since funding is limited.

Application Year: 2024-2025
Application ID: 7AEAF07E-315B-48EC-84A7-EA2F3DDC9CEE

To continue your 2024-2025 TASFA, click on the Resume button below.

[▶ Resume](#)

Application Year: 2023-2024

To begin your 2023-2024 TASFA, click on the Start button below.

[▶ Start](#)

[Privacy Policy](#) - Texas Higher Education Coordinating Board

Applications Section

The screenshot shows the 'Texas Application for State Financial Aid' website. The top navigation bar includes 'Home', 'Applications', 'Help', and '¿TASFA en español?'. The user is logged in as 'Hi Lourdes! (Logout)'. The main content area contains introductory text about TASFA, a contact instruction, and a table of application years. A modal dialog titled 'TASFA en español' is open, providing information about the availability of the application in Spanish. The dialog includes a heading '¿Está buscando la solicitud TASFA en español?' and two sections: one explaining that the online application is not available in Spanish and another section titled 'Looking for the TASFA in Spanish?' which provides instructions on how to complete the application in Spanish.

Home Applications Help ¿TASFA en español? Texas Application for State Financial Aid Hi Lourdes! (Logout)

The Texas Application for State Financial Aid (TASFA) is a **free** application that 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. If you're not sure which application (TASFA or FAFSA) to complete, use the [TASFA Decision Tool](#).

Contact the college you plan to attend to confirm first since funding is limited.

Application Year: 2024-2025
Application ID: DF504F4F-19E2-478D-ABC5-9218
Application Year: 2023-2024

TASFA en español

¿Está buscando la solicitud TASFA en español?

La solicitud TASFA en línea no se encuentra disponible en este momento en español. Para completar la solicitud TASFA en inglés en línea, puede consultar el PDF [TASFA en español](#). De lo contrario, puede completar la solicitud en español disponible en papel, la cual debe ser enviada directamente a la oficina de ayuda financiera de la universidad a la cual tiene pensado asistir. No llene una solicitud de TASFA en línea y otra en papel TASFA. Solamente es necesario llenar una.

Looking for the TASFA in Spanish?

The Online TASFA is not currently available in Spanish. You can refer to the paper [TASFA en español](#) to help complete the online TASFA in English. Otherwise, you can complete the Spanish paper application and you must send it directly to the Financial aid Office at the college you plan to attend. Do not fill out both an online and paper TASFA - only one is necessary.

Close

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Application Features

Student ◀ Previous Save Next ▶

DEMOGRAPHICS

1) Your Last Name ⓘ

2) Your First Name ⓘ

3) Your Middle Initial

4) Date of Birth ⓘ
 ⓘ

5) What is your Social Security Number (SSN), Individual Taxpayer Arrivals (DACA) number? Or mark N/A ⓘ

6) Preferred Action for Childhood

Date of birth fields no longer allow typing. Users are now prompted to select dates using a calendar.

March 2024

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Application Features

STUDENT MARITAL STATUS

17) What is your marital status as of today? ⓘ

REMARRIED

18) Month and year you were married, re

Month

SELECT

19) Year

SELECT

20) Year

2024

2023

2022

2021

2020

January

February

March

April

May

Marital Status Date fields no longer allow typing. Users are now prompted to select marital status dates using a drop-down menu.

Application Features

The masking button has been updated to offer users the ability to toggle data masking on and off with a single click.

61) Parent 1 Date of Birth 

03/11/2024



62) What is Parent 1's Social Security Number (SSN), Individual Taxpayer Identification Number (ITIN), Deferred Action for Childhood Arrivals (DACA) number? Or mark N/A 

SSN ITIN DACA N/A

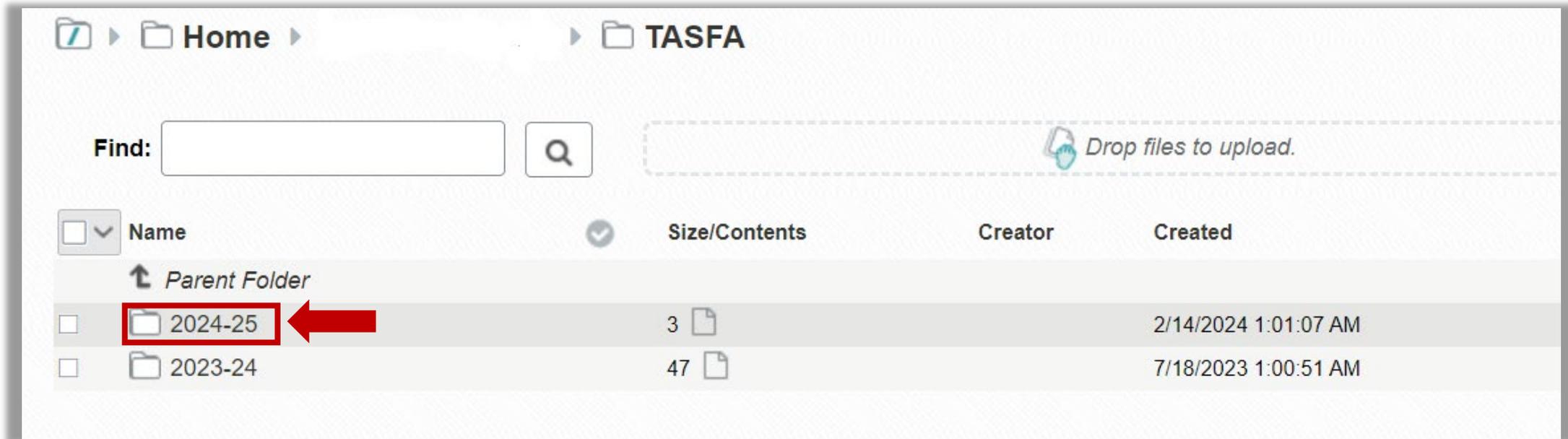
123456789



File Processing

Data File Processing

TASFA files will be sent daily through a secure file transfer protocol (SFTP) using THECB's online portal, [MOVEit DMZ](#), to the institutions dedicated TASFA folder. In addition, a comprehensive report containing the award year, applicant name, email and submission date will be sent to institutions to help confirm submission status.



The screenshot shows a file management interface with a breadcrumb path: Home > TASFA. Below the path is a search bar labeled "Find:" and a dashed box with a hand icon and the text "Drop files to upload." Below this is a table with columns: Name, Size/Contents, Creator, and Created. The table has a "Parent Folder" row and two data rows. The first data row is for the folder "2024-25", which is highlighted with a red box and a red arrow pointing to it. The second data row is for the folder "2023-24".

<input type="checkbox"/> Name	Size/Contents	Creator	Created
<input type="checkbox"/> <i>Parent Folder</i>			
<input type="checkbox"/> 2024-25	3		2/14/2024 1:01:07 AM
<input type="checkbox"/> 2023-24	47		7/18/2023 1:00:51 AM

NOTE: THECB is aware of technical issues affecting the output data from the 2024-25 (FY 2025) Online TASFA.

File Types - MOVEit

The screenshot shows a file manager interface with the following elements:

- Breadcrumb: Home > TASFA > 2024-25
- Search: Find: [input field] [magnifying glass icon]
- Upload: Drop files to upload. (with a dashed box and a hand icon)
- Table of files:

<input type="checkbox"/> Name	<input checked="" type="checkbox"/> Size/Contents	Creator	Created
<input type="checkbox"/> <i>Parent Folder</i>			
<input type="checkbox"/> 2024-25_ _TASFACUMULATIVE.csv	<input checked="" type="checkbox"/> 4.8 KB	dsv_moveitcentral_service	3/4/2024 1:00:53 AM
<input type="checkbox"/> 2024-25_ _TASFAOutput_03032024.csv	<input checked="" type="checkbox"/> 19.6 KB	dsv_moveitcentral_service	3/3/2024 1:01:56 AM
<input type="checkbox"/> 2024-25_ _TASFAOutput_03032024.txt	<input checked="" type="checkbox"/> 12.6 KB	dsv_moveitcentral_service	3/3/2024 1:00:22 AM

Cumulative File - MOVEit

	A	B	C	D	E	F	G
1	Award year	Student First Name	Student Last Name	Student Email Address	Student Application Id	Student Date of Birth	Acknowledgement Date
2	2024-2025	HENSON	JIM	ST.UDE.N.T.T.A.S.F.A.T.E.S.T.E.R.S@GMAIL.COM	666f1920-14be-49fa-9f31-67e23a181d38	10/13/2010	1/16/2024 10:49
3	2024-2025	MICHAEL	ANDREW	T.E.STACOUNT2024TEST@GMAIL.COM	199a3353-5fa3-4aaf-85b8-fb51e24767b9	4/16/1987	1/16/2024 16:16
4	2024-2025	MICHELLE	GARZA	T.E.S.TACOUNT2024TEST@GMAIL.COM	23900f86-54cb-4829-acd2-5e12cc86249c	6/14/2001	1/16/2024 16:44
5	2024-2025	MORTON	AZIE	STUDEN.T.T.A.S.F.A.T.E.S.T.E.R.S@GMAIL.COM	b55b7787-478a-4583-9f20-bab0ec538e95	4/17/2010	1/16/2024 16:45
6	2024-2025	MIGUEL	RYAN	T.E.STEM.AIL.E.X.P.ER.IMEN.T@GMAIL.COM	45ecf04e-bf5e-473f-a23f-3050b0837755	4/15/2004	1/16/2024 16:51
7	2024-2025	SWEET	TEA	S.T.U.D.E.N.T.T.ASFATESTERS@GMAIL.COM	89f56bc6-1d87-42b5-9b03-53455085688a	1/1/2000	12/30/2023 14:50
8	2024-2025	CHACHALACA	BIRD	S.T.U.D.E.NTTASFATESTERS@GMAIL.COM	d188e30c-77da-459f-8a6d-cf5e593b68b6	3/3/2003	12/30/2023 16:43
9	2024-2025	LION	KING	I.A.M.T.H.E.S.T.U.D.E.N.T.T.E.S.T.E.R@GMAIL.COM	64c479ef-74d4-4041-bc90-c512dcfd9cf2	4/5/2007	12/15/2023 10:52

<input type="checkbox"/>	Name	Size/Contents	Creator	Created
↑ Parent Folder				
<input type="checkbox"/>	2024-25_ _TASFACUMULATIVE.csv	4.8 KB		
<input type="checkbox"/>	2024-25_ _TASFAOutput_03032024.csv	19.6 KB		
<input type="checkbox"/>	2024-25_ _TASFAOutput_03032024.txt	12.6 KB		

A cumulative CSV file will be uploaded into MOVEit daily and will include only the applicants that have submitted a TASFA for the applicable award year for the specific institution.

Output Files - MOVEit

Q	R	S	T	
1				
2	SCHOOL_CODE	STUDENT_FIRST_BACHELORS_DEGREE	STUDENT_BORN_MALE_OR_FEMALE	STUDENT_CURRENT_SELECTIVE_SERVICE_REGIST
3	227901019	2 M		2
4	227901002	2 F		
5		2 M		2
6	108807004	2 F		
7	140901001	2 M		4

<input type="checkbox"/> Name	<input checked="" type="checkbox"/> Size/Contents	Creator	Created
↑ Parent Folder			
<input type="checkbox"/> 2024-25_ _TASFACUMULATIVE.csv	<input checked="" type="checkbox"/> 4.8 KB		
<input type="checkbox"/> 2024-25_ _TASFAOutput_03032024.csv	<input checked="" type="checkbox"/> 19.6 KB		
<input type="checkbox"/> 2024-25_ _TASFAOutput_03032024.txt	<input checked="" type="checkbox"/> 12.6 KB		

When new applications are submitted, a CSV file with TASFA data records from that day will be uploaded onto MOVEit.

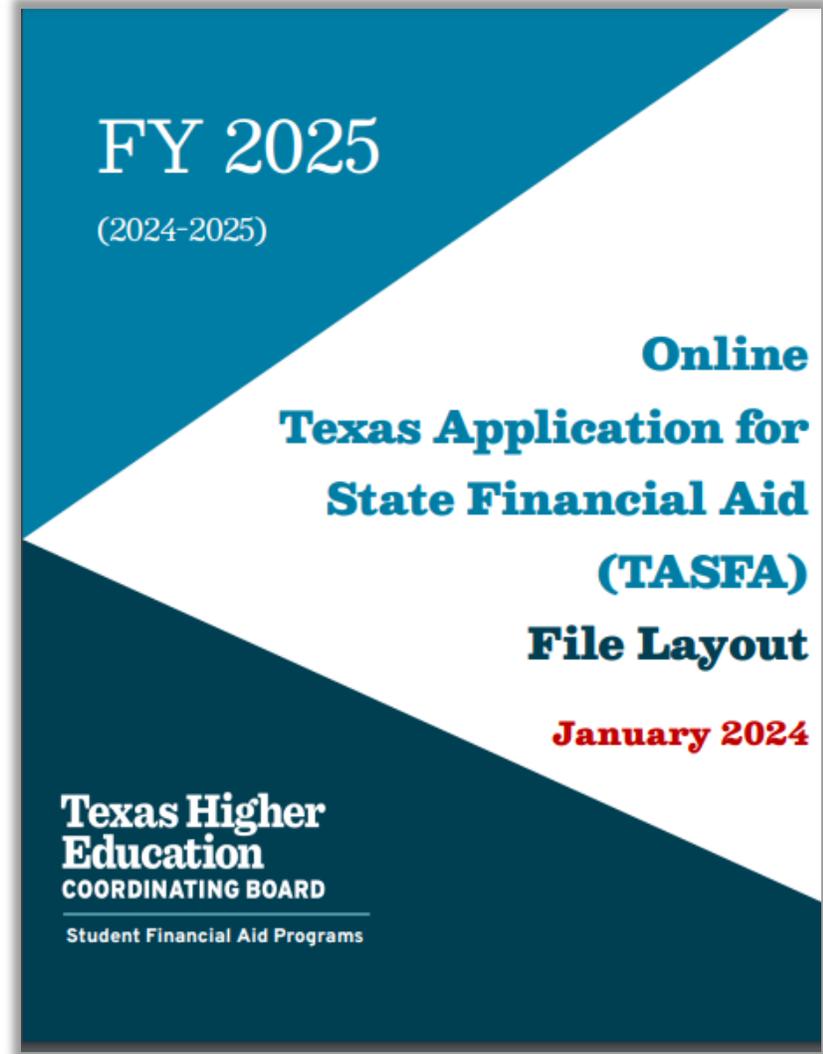
TASFA Resources

Online TASFA Resources

- [Online TASFA FY 2025 File Layout \[PDF\]](#)

General TASFA Resources

- [Dedicated TASFA Webpage](#)
 - Access Online/Paper TASFA applications
 - Frequently Asked Questions
 - Help page



Financial Aid Programs Overview



TEXAS TRANSFER GRANT



TEXAS FIRST
SCHOLARSHIP PROGRAM

Texas Transfer Grant

Overview

Texas Transfer Grant Purpose

The Texas Transfer Grant (Transfer Grant) Program provides need-based grants to enable eligible students to transfer from public two-year to four-year institutions of higher education within Texas.



NOTE: The Texas Transfer Grant is a newly established program which is separate from the pilot program that was administered during the 2022-23 academic year (see [Texas Administrative Code, Title 19, Part 1, Chapter 22, Subchapter K](#)).

Student Eligibility

To qualify for a Transfer Grant, 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 and show financial need;
- ✓ be enrolled in a baccalaureate degree program at an eligible institution on a **full-time** basis;
- ✓ have earned an associate degree at a Texas public 2-year institution with a minimum 2.5 grade point average



Award Amounts

The maximum semester grant amount will be consistent with the maximum semester amount for the Toward EXcellence, Access, and Success (TEXAS) Grant.

FY 2024

- Maximum semester grant amount:
\$5,387
- Estimated Family Contribution (EFC):
\$6,464

FY 2025

- Maximum semester grant amount:
\$5,394
- Student Aid Index (SAI):
\$6,472

NOTE: Please refer to the [memo dated March 5, 2024](#), for more information.

Intent to Participate

Directors of Financial Aid at Texas public universities and Health Related Institutions (HRIs) have been invited to participate in the Transfer Grant Program.

The deadline to submit the Transfer Grant Intent to Participate Form is **April 8, 2024**.

Texas Higher Education COORDINATING BOARD

Memorandum

TO: Directors of Financial Aid, Public Universities and Health Related Institutions (HRIs)

FROM: DeChà Reid
Director III, Student Financial Aid Programs (SFAP) Operations

DATE: March 12, 2024

SUBJECT: 2023-24 (FY 2024) and 2024-25 (FY 2025) Texas Transfer Grant (Transfer Grant) Intent to Participate

The Texas Higher Education Coordinating Board is required to invite eligible institutions to participate in the Texas Transfer Grant program to be included in the allocation calculation process. The newly established program, which is separate from the "pilot program," received state-appropriated funds for the 2023-24 (FY 2024) and 2024-25 (FY 2025) academic years during the 88th Legislative Session.

All institutions **are required** to complete the enclosed Intent to Participate form by **April 8, 2024** (see [Texas Administrative Code, Title 19, Chapter 22, Section 22.202](#)). Institutions that do not confirm their intent to participate by the deadline will not be included in the initial allocation calculation process.

For questions, please call (844) 792-2640 or submit an online inquiry through [CONTACT US](#) (select "Financial Aid Question" for the Contact Reason).

Enclosed: [Transfer Grant Intent to Participate Form](#)

To learn more...

Please review [Texas Administrative Code, Title 19, Part 1, Chapter 22, Subchapter K](#).

Additional resources will be published on the Student Financial Aid Programs (SFAP) webpage to further support institutions.

Texas Transfer Grant Program

Texas Transfer Grant program funds are available to eligible students attending General Academic Teaching Institutions (GATIs) in Texas (excluding Lamar State College-Orange and Lamar State College-Port Arthur) and Health Related Institutions (HRIs). Rules establishing procedures to administer the program can be found in [Texas Administrative Code, Title 19, Part 1, Chapter 22, Subchapter K](#).

— [FY 2025 Texas Transfer Grant Program Guidelines \[PDF\] - COMING SOON!](#)

<https://www.highered.texas.gov/our-work/supporting-our-institutions/student-financial-aid-programs/program-resources/grant-loan-programs/>

Texas First Scholarship

Updates

Texas First Scholarship Program

The **Texas First Scholarship Program** was established to incentivize the enrollment of high performing students at Texas public institutions of higher education.



The image shows a sample certificate for the Texas First Program Scholarship. The certificate is titled "TEXAS FIRST PROGRAM SCHOLARSHIP CERTIFICATE" and is issued by the Texas Higher Education Coordinating Board. It certifies that the holder is a Texas First Diploma recipient and may be eligible to receive a state credit up to a maximum amount of \$ X,XXX. The certificate is signed by the Director III, SFAP Operations. The certificate ID is 0022035-1. The address is 1801 N. Congress Ave., Suite 12.200, Austin, TX 78701. The phone number is 512-427-6101 and the fax number is 512-427-6127. The website is HIGHERED.TEXAS.GOV.

Texas First Program **Texas Higher Education**
COORDINATING BOARD

**TEXAS FIRST PROGRAM SCHOLARSHIP
CERTIFICATE**

This certifies that the Texas Higher Education Coordinating Board received documentation confirming that the holder of this certificate is a Texas First Diploma recipient and, therefore, may be eligible* to receive a state credit up to the maximum amount of:

\$ X,XXX

THECB Signer

Director III, SFAP Operations
Title

*Other conditions apply. Please review the attached terms and conditions, and the Texas Administrative Code, Title 19, Part 1, Chapter 22, Sections 22.553 - 22.555 at https://texreg.sos.state.tx.us/public/readtacSext.ViewTAC?tac_view=58&ti=19&pt=1&ch=22&sch=T&rl=Y

CERTIFICATE ID: 0022035-1
Address: 1801 N. Congress Ave., Suite 12.200, Austin, TX 78701 • Mail: PO Box 12788, Austin, TX 78711-2788
Phone: 512-427-6101 • Fax: 512-427-6127 HIGHERED.TEXAS.GOV

[Texas Administrative Code, Title 19, Part 1, Chapter 22, Subchapter](#)

Texas First Scholarship Eligibility

Student Eligibility

To qualify for this scholarship, a student **must**:

- Be enrolled at an eligible institution;
- Be a resident of Texas;
- Be registered for Selective Service, or be exempt; **and**
- Have graduated early from high school under the Texas First Early High School Completion Program.

Institutional Eligibility

Students graduating under the TX First Program: On or After Sept. 1, 2023

ALL Texas public institutions.

Students graduating under the TX First Program: Prior to Sept. 1, 2023

Texas A&M University	The University of Texas at Arlington
Texas Tech University	The University of Texas at Dallas
The University of Texas at Austin	University of North Texas
The University of Texas at El Paso	The University of Texas at San Antonio
Texas State University	University of Houston

NOTE: For information on rule changes and roster updates, please refer to the [memo dated February 29, 2024](#),

UPDATE Recipient Rosters

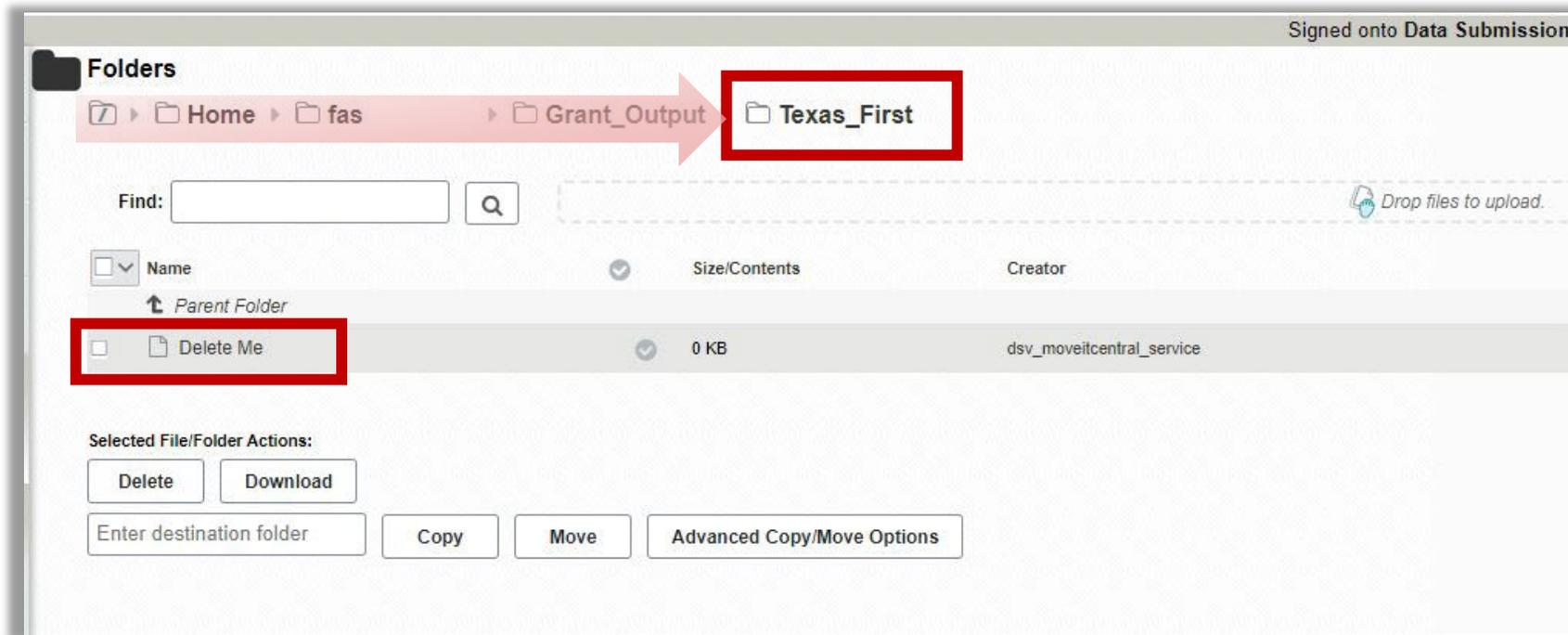
- ✓ Recipient rosters includes a list of **all** eligible students who have been issued a certificate.
 - *High School Graduation Date* added
 - *Date Certificate Issued by THECB* moved to column G
- ✓ Roster updates occur when new certificates are issued.
- ✓ Institutions are **not required** to collect scholarship certificates issued by THECB to the student.

The screenshot shows a file explorer interface with a folder structure: Home > fas > Grant_Output. A search bar is present. Below the folder list, several Excel files are listed, including 'Texas First Diploma Institution Roster_2023-8-18.xlsx', 'Texas First Diploma Institution Roster_2023-8-11.xlsx', 'Texas First Diploma Institution Roster_2023-8-4.xlsx', and 'Texas First Diploma Institution Rosters_2023-7-21.xlsx'. A table of recipient rosters is overlaid on the file list. A red arrow labeled 'NEW' points to the table. A red box highlights the filter buttons 'FY2024_TX_First_Scholars' and 'FY2023_TX_First_Scholars'.

Student First Name	Student Last Name	Social Security Number (Last Four Digits Only)	Date of Birth	High School Graduation Date	Certificate Award Amount (Recipient may receive)	Date Certificate Issued by THECB
John	Doe	0001	1/10/2005	12/23/2022	\$5,387	7/14/2023
Jane	Doe	0002	2/11/2006	5/26/2023	\$10,774	9/18/2023

NEW Texas First Folder in MOVEit

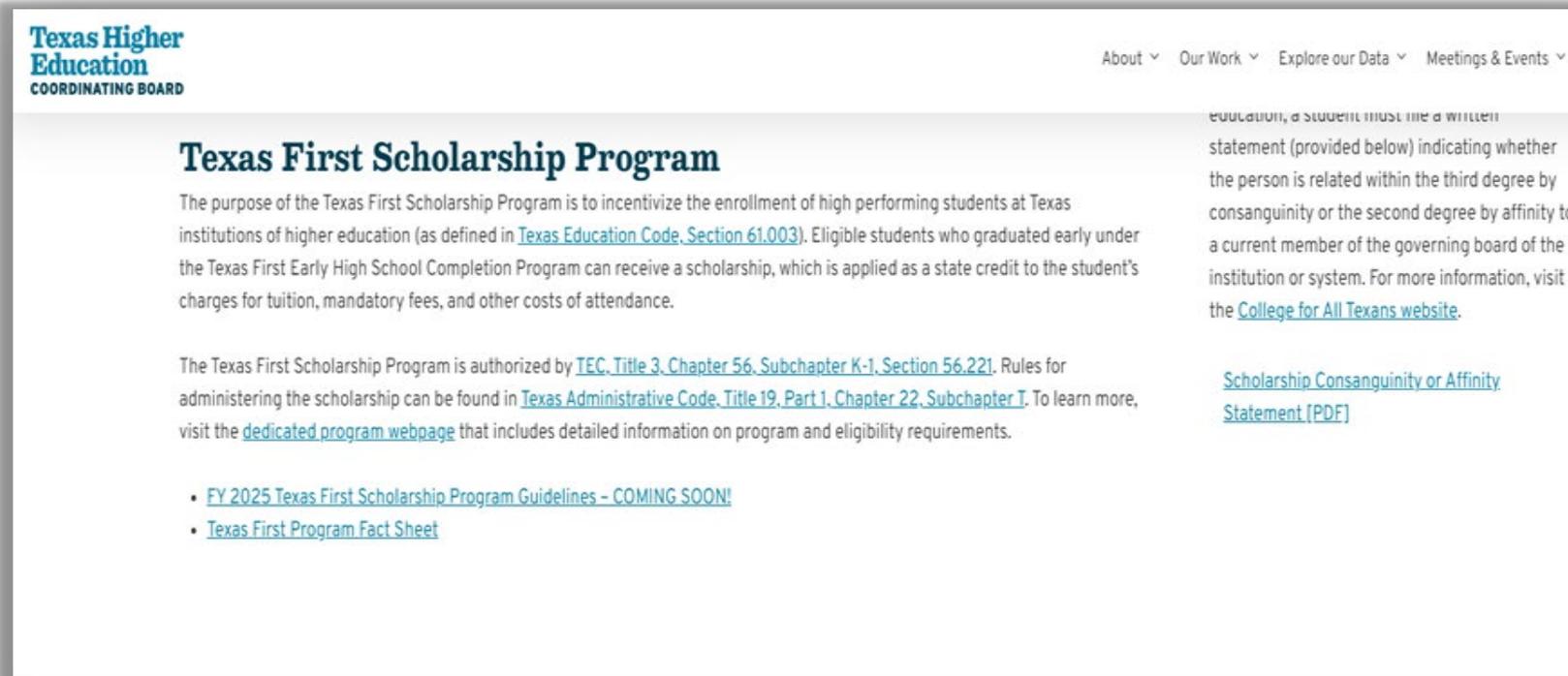
A **Texas_First** folder has been created in MOVEit DMZ for all public institutions. Rosters have been moved into the new folder for institutions to access.



Note: As a reminder, MOVEit DMZ does not generate a "file upload" notification, so institutions should determine their file retrieval frequency

To learn more...

Please review [Texas Administrative Code, Title 19, Part 1, Chapter 22, Subchapter T.](#)



The screenshot shows the Texas Higher Education Coordinating Board website. The header includes the logo and navigation links: About, Our Work, Explore our Data, and Meetings & Events. The main content area is titled "Texas First Scholarship Program" and contains the following text:

The purpose of the Texas First Scholarship Program is to incentivize the enrollment of high performing students at Texas institutions of higher education (as defined in [Texas Education Code, Section 61.003](#)). Eligible students who graduated early under the Texas First Early High School Completion Program can receive a scholarship, which is applied as a state credit to the student's charges for tuition, mandatory fees, and other costs of attendance.

The Texas First Scholarship Program is authorized by [TEC, Title 3, Chapter 56, Subchapter K-1, Section 56.221](#). Rules for administering the scholarship can be found in [Texas Administrative Code, Title 19, Part 1, Chapter 22, Subchapter T](#). To learn more, visit the [dedicated program webpage](#) that includes detailed information on program and eligibility requirements.

- [FY 2025 Texas First Scholarship Program Guidelines - COMING SOON!](#)
- [Texas First Program Fact Sheet](#)

On the right side of the page, there is a section titled "education, a student must file a written statement (provided below) indicating whether the person is related within the third degree by consanguinity or the second degree by affinity to a current member of the governing board of the institution or system. For more information, visit the [College for All Texans website](#)." Below this text is a link: [Scholarship Consanguinity or Affinity Statement \(PDF\)](#).

<https://www.highered.texas.gov/our-work/supporting-our-institutions/student-financial-aid-programs/program-resources/work-study-scholarships/>

Grant Aid & Processing Portal (GAPP)

Transfer Requests

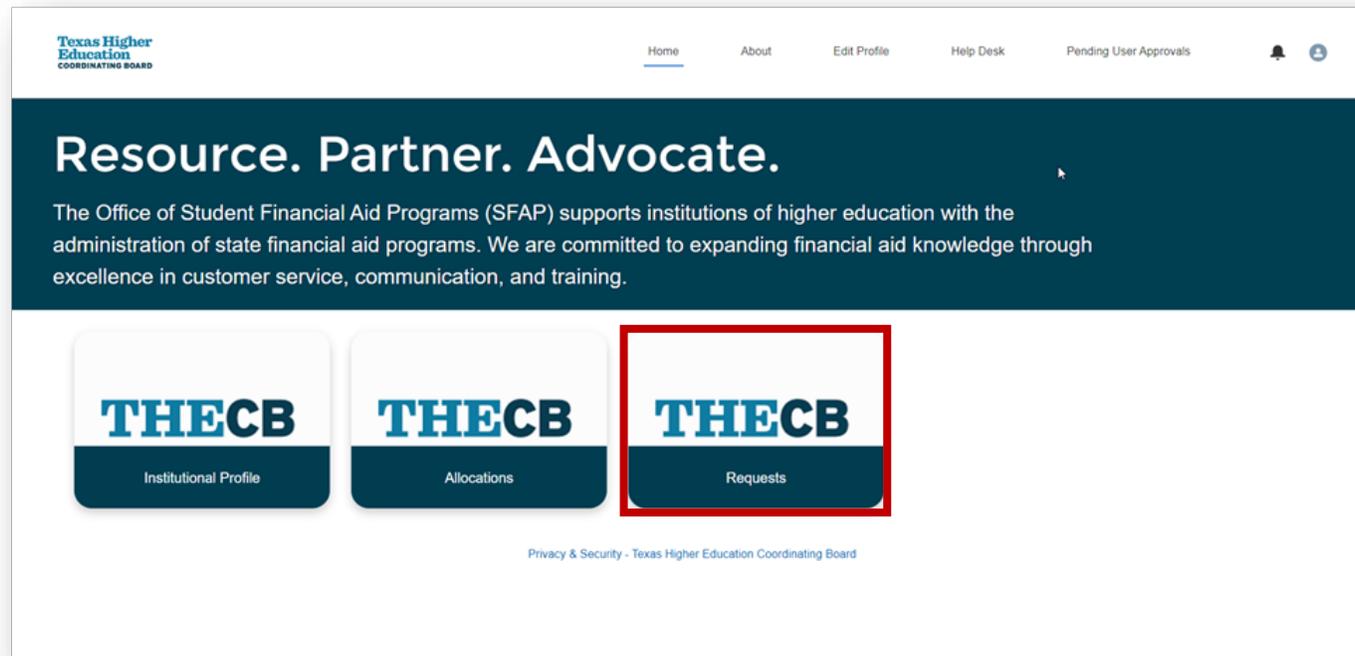
GAPP Roles



GAPP Roles that can perform a transfer request are:

- ✓ Primary Point of Contact (PPC)
- ✓ Secondary Point of Contact (SPC)
- ✓ Reporting Official (RO)

GAPP Requests



To submit a request, institutions will need to click on the *Requests* tile from the Home screen.

GAPP Portal Transfer Requests

The screenshot displays the GAPP Portal interface. At the top left is the THECB logo. The top navigation bar includes links for Home, About, Edit Profile, and Help Desk, along with search, notification, and user profile icons. Below the navigation bar, there is a 'Recently Viewed' section with a dropdown arrow and a list of two items, each with a checkbox and an 'IR Name' label. To the right of this section is a menu with four options: 'Payment Request', 'Transfer Request', 'Return of Funds', and 'Update Student Count'. A blue arrow points from the 'Transfer Request' option in the menu to a larger, detailed view of the menu below. In this detailed view, the 'Transfer Request' option is highlighted with a red border.

Select *Transfer Request* from menu.

GAPP Portal Transfer Requests

The screenshot shows the 'Transfer Request' form in the GAPP Portal. The form includes several fields: 'Request Type' (set to 'Transfer Request'), 'Maximum Transferable Amount', 'From Program' (a dropdown menu with options 'TEXAS Grant' and 'Texas College Work-Study'), 'To Program' (a dropdown menu with 'Select an Option'), and 'Program Fiscal Year'. A red box highlights the 'From Program' dropdown menu, which is currently open. The 'Close' and 'Submit' buttons are located at the bottom right of the form.

Use drop box under the *From Program* field to select the appropriate program.

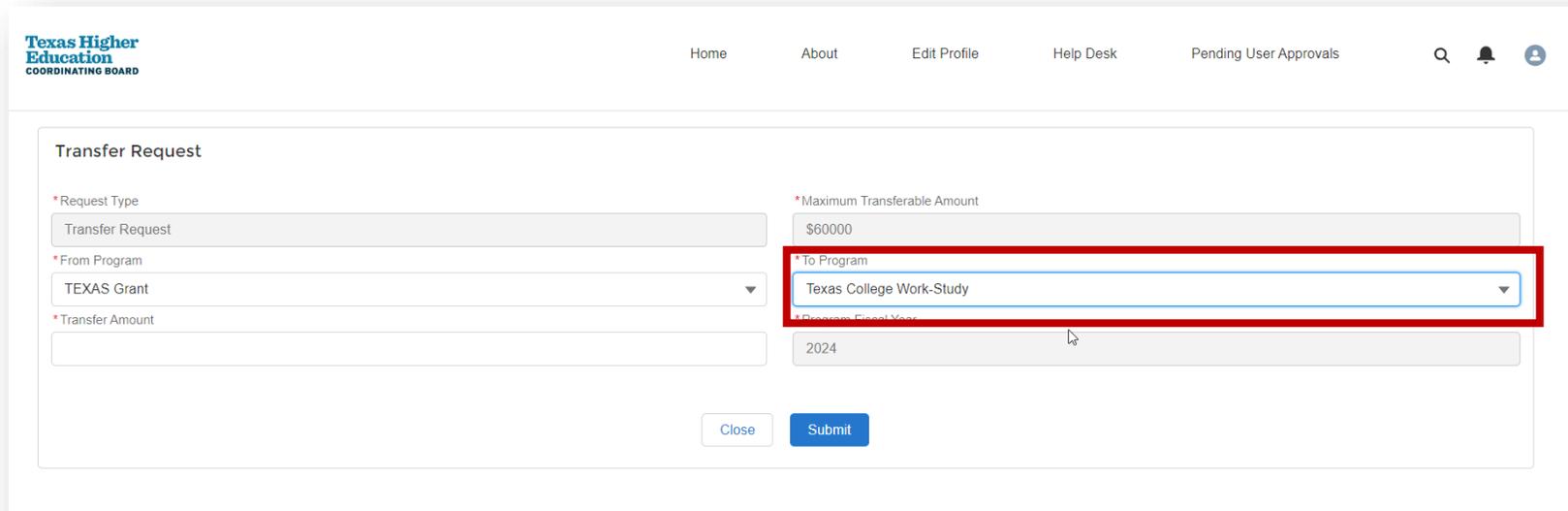
GAPP Portal Transfer Requests

The screenshot shows the 'Transfer Request' form in the GAPP Portal. The form includes the following fields:

- *Request Type:** A text input field containing 'Transfer Request'.
- *From Program:** A dropdown menu with 'TEXAS Grant' selected.
- *Maximum Transferable Amount:** An empty text input field.
- *To Program:** A dropdown menu with 'Select an Option' selected. This field is highlighted with a red rectangular border.
- *Program Fiscal Year:** A text input field containing '2024'.
- *Transfer Amount:** An empty text input field.

At the bottom of the form, there are two buttons: 'Close' and 'Submit'.

GAPP Portal Transfer Requests



The screenshot shows the 'Transfer Request' form in the GAPP Portal. The form includes the following fields:

- * Request Type:** Transfer Request
- * From Program:** TEXAS Grant
- * Transfer Amount:** (Empty text input)
- * Maximum Transferable Amount:** \$60000
- * To Program:** Texas College Work-Study (highlighted with a red box)
- * Program Final Year:** 2024

At the bottom of the form, there are 'Close' and 'Submit' buttons.

Use drop box under the *To Program* field to select the appropriate program.

GAPP Portal Transfer Requests

Texas Higher Education COORDINATING BOARD

Home About Edit Profile Help Desk Pending User Approvals

Transfer Request

* Request Type
Transfer Request

* From Program
TEXAS Grant

* Transfer Amount
10000

* Maximum Transferable Amount
\$60000

To Program
Texas College Work-Study

* Program Fiscal Year
2024

Close Submit

GAPP Portal Transfer Requests

Sandbox: Initiating Transfer Request

Deliverability Reply Forward Print Delete

fasoperations@highered.texas.gov <fasoperations@highered.texas.gov>

Thursday, February 29, 2024 4:18:13 PM

Hello Monique Tester,

Your request to transfer funds from TEXAS Grant to Texas College Work-Study for your institution has been received. Please log in to the Grants and Aid Processing Platform (GAPP) portal to view the status.

Should you have any additional questions, please contact Financial Aid Services (844) 792-2640 or through the GAPP Help Desk

Thank you,
Financial Aid Services
Texas Higher Education Coordinating Board

Hello Monique Tester,

Your request to transfer funds from TEXAS Grant to Texas College Work-Study for your institution has been received. Please log in to the Grants and Aid Processing Platform (GAPP) portal to view the status.

Should you have any additional questions, please contact Financial Aid Services (844) 792-2640 or through the GAPP Help Desk

Thank you,
Financial Aid Services
Texas Higher Education Coordinating Board

GAPP Portal Transfer Requests

Texas Higher Education COORDINATING BOARD

Home About Edit Profile Help Desk Pending User Approvals

Transfer Requests

Payment Request Transfer Request Return of Funds Update Student Count

5 items • Sorted by IR Name • Filtered by All institutional requests - Request Type • Updated a few seconds ago

Search this list...

	<input type="checkbox"/> IR Name ↑	Program	To Program	Transfer ...	External Status	Submitted By	Submitted ...	
1	<input type="checkbox"/> IR-00015	Texas Grants	Work-Study Student Mentorship	\$500	Pending PPC Approval	Rhoda Report	8/9/2023	▼
2	<input type="checkbox"/> IR-00016	Texas Grants	Work-Study Student Mentorship	\$300	Submitted for Approval	Rita Book	8/9/2023	▼
3	<input type="checkbox"/> IR-00025	Work-Study Student Mentorship	Texas Grants	\$100	Cancelled - Please Review Your Messages	Paige Turner	8/15/2023	▼
4	<input type="checkbox"/> IR-00026	Texas Grants	Work-Study Student Mentorship	\$50	Submitted for Approval	Paige Turner	8/15/2023	▼
5	<input type="checkbox"/> IR-00206	TEXAS Grant	Texas College Work-Study	\$10,000	Submitted for Approval	Monique Tester	2/16/2024	▼

GAPP Portal Transfer Requests

Texas Higher Education COORDINATING BOARD

Home About Edit Profile Help Desk Pending User Approvals

Submitted for Approval Cancelled Not Approved Approved

Transfer Request

* Request Type: Transfer Request

* From Program: TEXAS Grant

* Transfer Amount: \$10000

* Maximum Transferable Amount: \$60000

* To Program: Texas College Work-Study

* Program Fiscal Year: 2024

Close

Last Payment Request Option

Texas Higher Education
COORDINATING BOARD

Home About Edit Profile Help Desk

Review in Progress Cancelled Approved Paid

Payment Request

Request Type
Payment Request

*Amount
\$2,339,965.00

*Number of Students
2,000

Total Number of Students

*Program
TEOG (Community College)

*Fiscal Year
2024

Remaining Amount
\$6,571,246.00

Last Payment Request For Program

Acknowledgement:
 I acknowledge that submission of a payment request serves as confirmation that the institution understands the timely distribution requirements outlined in TAC Rule 22.2

Close Submit

The ***Last Payment Request For Program*** option should only be chosen if institutions intend to close out the program for the year.

To find if this box is checked, go to **Requests** tile → Click on **Payment Requests** → If checked, send **GAPP Help Desk** ticket.

Deadlines, Reminders & Notifications

2023-24 Financial Aid Database (FAD)

Reporting Updates and Deadlines

FAD Report Deadlines

Institutions are required to submit a comprehensive FAD Report two times a year. The second cycle requires a validation of data, and the third report cycle requires certification.

Important: Institutions that fail to adhere to the deadline dates listed risk postponement of future state financial aid disbursements, including loan disbursements.

Reporting Cycle	First Day to Submit	Deadline to Submit Initial FAD File*	Deadline to Validate or Certify FAD file	Submission Requirements
First	Beginning 2023-24 (FY 2024), institutions are no longer required to submit Reporting Cycle One.			
Second	May 29, 2024	June 12, 2024	July 17, 2024	Deadline to validate student data.
Third	Sept. 18, 2024	Oct. 9, 2024	Nov. 20, 2024	Deadline to reconcile state program totals and certify student data.

NEW Data Elements

The FAD report manual for FY 2024 (2023-24) is now available and posted on the Student Financial Aid Programs (SFAP) information webpage under [Program Resources](#).

Data Element	Type Length	Description	Edits
120) New Texas Leadership Scholars POSITION 472-476	Numeric XXXXXX	5 characters, right justified Range 0 - COA	Error if non-numeric Error if > 0 and private/independent institution, public state college, public community college, public health-related or public technical institute Error if > 0 and Residency (#36) = 2 or 3 Error if > 0 and Enrollment Status (#) = 2 or 3 or 4 Error if > 0 and classification (#33) = 1 or 2 or 3 or 5 or 6 Error if > COA
121) New Nursing Scholarship POSITION 477-481	Numeric XXXXXX	5 characters, right justified Must enter "00000" Do not leave blank	Error if non-numeric Error if not 0
119) New Texas Transfer Grant POSITION 467-471	Numeric XXXXXX	5 characters, right justified Range 0 - 16161	Error if non-numeric Error if > 0 and private/independent institution, public state college, public community college, or public technical institute Error if > COA (#46) - EFC (#47) & EAP (#93, #94) > 0 Error if > COA (#46) - EFC (#47) Error if > 0 and Residency (#36) = 2 or 3 Error if > 0 and classification (#33) = 1 or 2 or 3 or 5 or 6 Error if > 0 and TEXAS Grant (#68) > 0 and hardship provision (#58) ≠ 1 Error if > 16161

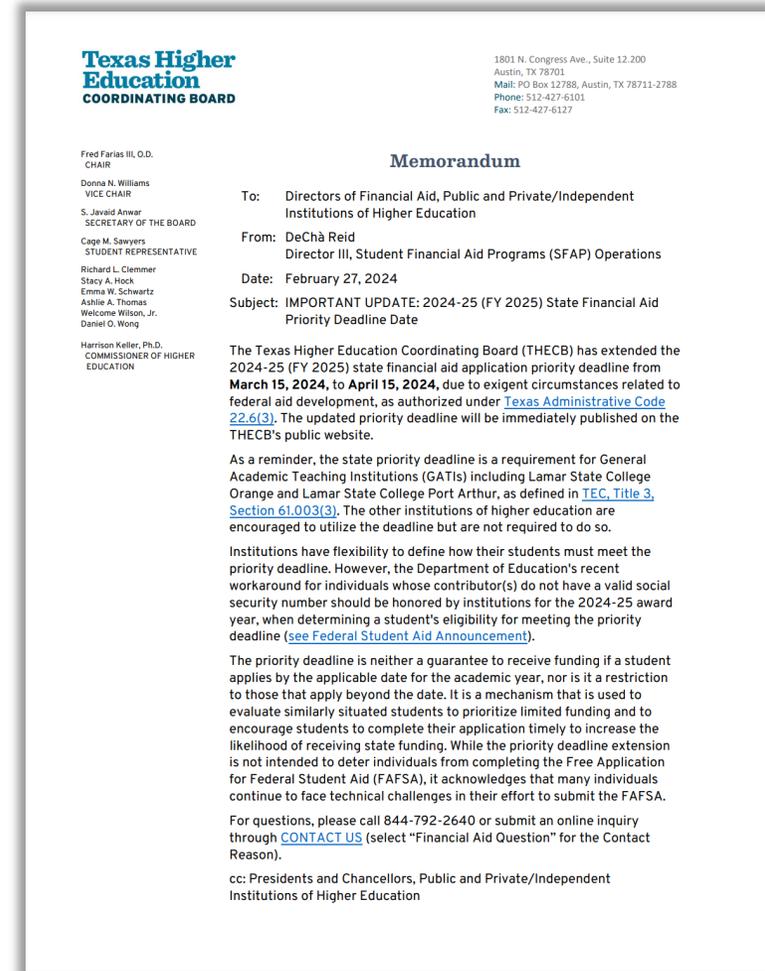
State Priority Deadline

UPDATE State Priority Deadline Date

Memo was sent February 28, 2024, to communicate:

- The state priority deadline was extended due to exigent circumstances related to federal aid development, as authorized under [Texas Administrative Code 22.6\(3\)](#).
- Is a requirement for General Academic Teaching Institutions (GATIs) including Lamar State College Orange and Lamar State College Port Arthur, as defined in [TEC, Title 3, Section 61.003\(3\)](#).
- Institutions have flexibility to define how their students must meet the priority deadline.*

*The priority deadline is neither a guarantee to receive funding if a student applies by the applicable date for the academic year, nor is it a restriction to those that apply beyond the date. It is a mechanism that is used to evaluate similarly situated students to prioritize limited funding and to encourage students to complete their application timely to increase the likelihood of receiving state funding.



Deadlines, Reminders, & Notifications

Deadlines

- Confirm Intent to Participate for EAE, Texas Transfer Grant and FAST programs: [4/8](#)
- Submit Electronic Copy of the TEG Engagement Report: [4/15](#)

Reminders

- Setup Recurring Transfer Index (RTI) codes for Unified State Accounting System (USAS) to receive payments for FAST program
- We are aware of technical issues affecting output data from the 2024-25 Online TASFA and we will notify institutions once resolved.

Recent Notifications

- NOTICE: Texas Transfer Grant (Transfer Grant) Program Memo - [3/5](#)
- UPDATE: Texas First Scholarship Program Memo - [2/29](#)
- NOW AVAILABLE: 2024-25 (FY 2025) Online Texas Application for State Financial Aid (TASFA) Memo - [2/29](#)
- IMPORTANT UPDATE: 2024-25 (FY 2025) State Financial Aid Priority Deadline Date Memo - [2/27](#)
- NOTICE: State Financial Aid Updates, Reminders, and Upcoming Deadlines Memo - [2/22](#)

Stay Connected

Contact Student Financial Aid Programs

For Borrowers and the Public:

Borrower Services

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

Texas Financial Aid Information Center (TFAIC)

- Public Line: (888) 311-8881

For Institutions:

FAS Institutional Phone Line

- Institutions Only: (844) 792-2640

For Everyone:

Email

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

All Phone Lines
Hours of Operation:
Mon-Fri
8 AM to 5 PM
(Closed Daily from 12-1)



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
- ✓ Enter the **Description** of your inquiry
- ✓ Provide the best **Direct Phone Number**

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](#)

Training Requests

This form is used to collect training requests from institutions/organizations.

All requests should be submitted at least 30 days in advance to be considered.

Training requests are approved based on trainer availability.

Please allow up to five business days for the training request to be reviewed.

Training Information Section

Select training method of delivery. *

In-Person

Webinar

Select the training requested. *

Conference

Programs (e.g. TEG, TEOG, CAL)

Systems (e.g. GAPP, Data Submission Portal)

Other - Provide a detailed description of the desired training.

Training Start Date *

For multiple training dates, please complete a separate request.

Training End Date *

Provide a detailed description of the desired training. *

Preferred duration of training session *

1 Hour Session

2 Hour Session

Half-Day Session

Full-Day Session

<https://app.smartsheet.com/b/form/4f344e8e1f3c48c5902f005779ffd59e>

GAPP Help Desk Ticket

For questions on transactions and payment requests in GAPP, submit a GAPP helpdesk ticket.

- ✓ Enter a **Subject**
- ✓ Select your **Request Type**
- ✓ Select the **Program Type**
- ✓ Enter **Description** of issue
- ✓ **Submit** ticket

The screenshot shows the 'Create a Ticket' form on the Texas Higher Education Coordinating Board website. The form includes the following fields and elements:

- Subject:** A text input field with a red asterisk, highlighted with a blue border.
- Request Type:** A dropdown menu with 'Select an Option' and a red asterisk, highlighted with a blue border.
- Program Type:** A dropdown menu with 'Select an Option' and a red asterisk, highlighted with a blue border.
- Initial Description of Issue:** A rich text editor with a red asterisk, containing a toolbar with options like font size (12), bold (B), italic (I), underline (U), link, unlink, list, and indent. The text area is highlighted with a blue border.
- Upload:** A section with 'Upload Files' and 'Or drop files' buttons.
- Created By:** A text field containing 'PJC Tester1'.
- Buttons:** 'Cancel', 'Save as Draft', and 'Submit' buttons at the bottom right. The 'Submit' button is highlighted with a red border.

A woman in a white lab coat is looking at a laptop screen in a laboratory setting. The image is overlaid with a dark teal background and a thin yellow circular line on the left and right sides.

Texas Higher Education

COORDINATING BOARD

Questions?

Thank you!

We appreciate your feedback.

Please take a moment to complete our survey.

