Texas Higher Education
COORDINATING BOARD

Texas Transfer Grant Pilot Program

January 25, 2023

Topics of Discussion

- Program Reminders
- Requesting Reimbursement & Returning Funds
- Additional Resources
- Questions

Program Reminders

Program Administration

Awarding

- Student **must** be listed on institution's roster .
- The amount of this grant must **NOT** be reduced unless the total amount of the Transfer Grant plus other aid exceeds the student's COA.
- Reduce loans and work-study prior to reducing Transfer Grants

Enrollment Eligibility

- Eligible students MUST enroll in **at least 9 SCHs** as of the institution's census date.

Over Awards

- If a recipient receives assistance that exceeds their COA, the institution is not required to adjust the award unless the sum of the excess resources is greater than $300.

Selective Service Criteria

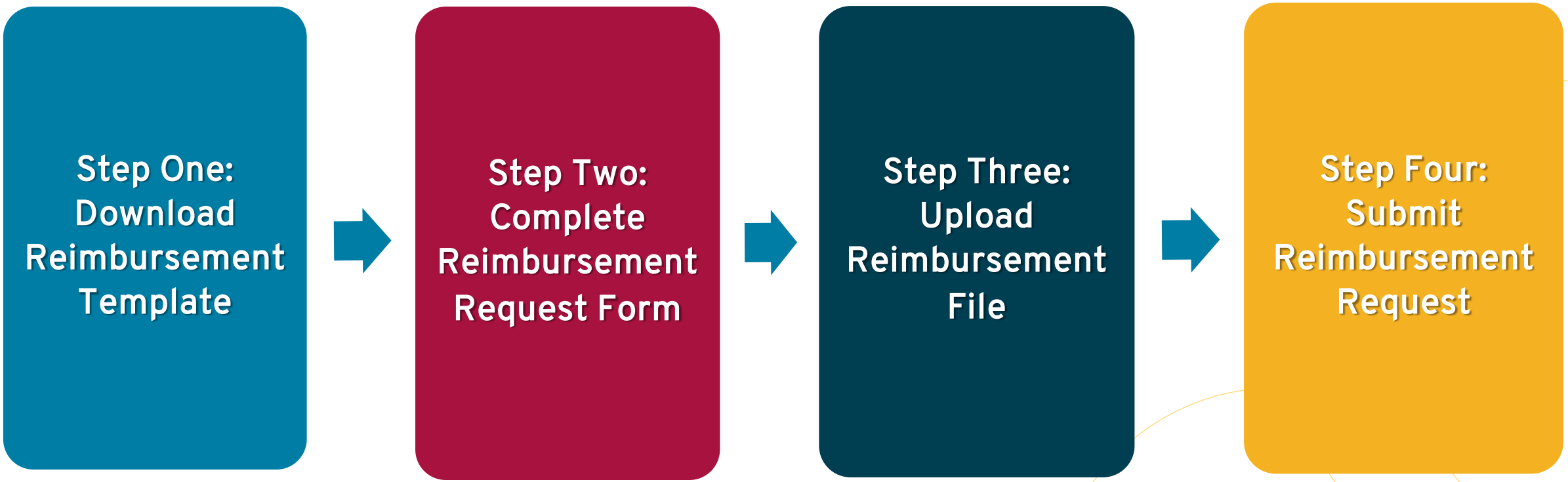
Q: Are Transfer Grant funds subject to the Selective Service criteria?

A: Yes. Under Texas Education Code (TEC), Title 3, Section 51.9095, an individual must file a statement of their selective service status with the institution confirming registration or exemption. This statute applies to:

- all state-funded financial aid, and
- federal funds or gifts and grants accepted by this state (including federal aid or private donations that pass through the state Treasury or Governor's office).
  - I.E., GEER, state-appropriated funds, etc.

Requesting Reimbursement

Requesting Reimbursement



Step One: Reimbursement Template

Institution Name:	Type "Institution Name" in this field. ABC University	Total Disbursed Amount:	$ Auto Populated $75,000

Complete each data field below for ALL eligible students who received a Texas Transfer Grant disbursement.

NOTE: When entering data that begins with a zero, include an apostrophe (') before the leading zero.

- **Example #1:** FICE 012345 would be entered as '012345.
- **Example #2:** SSN 023456789 would be entered as '023456789.

Spring 2023 Reimbursement Recipient Data

To receive reimbursement, a student must have been enrolled in at least nine semester credit hours (SCHs) through institutional census.

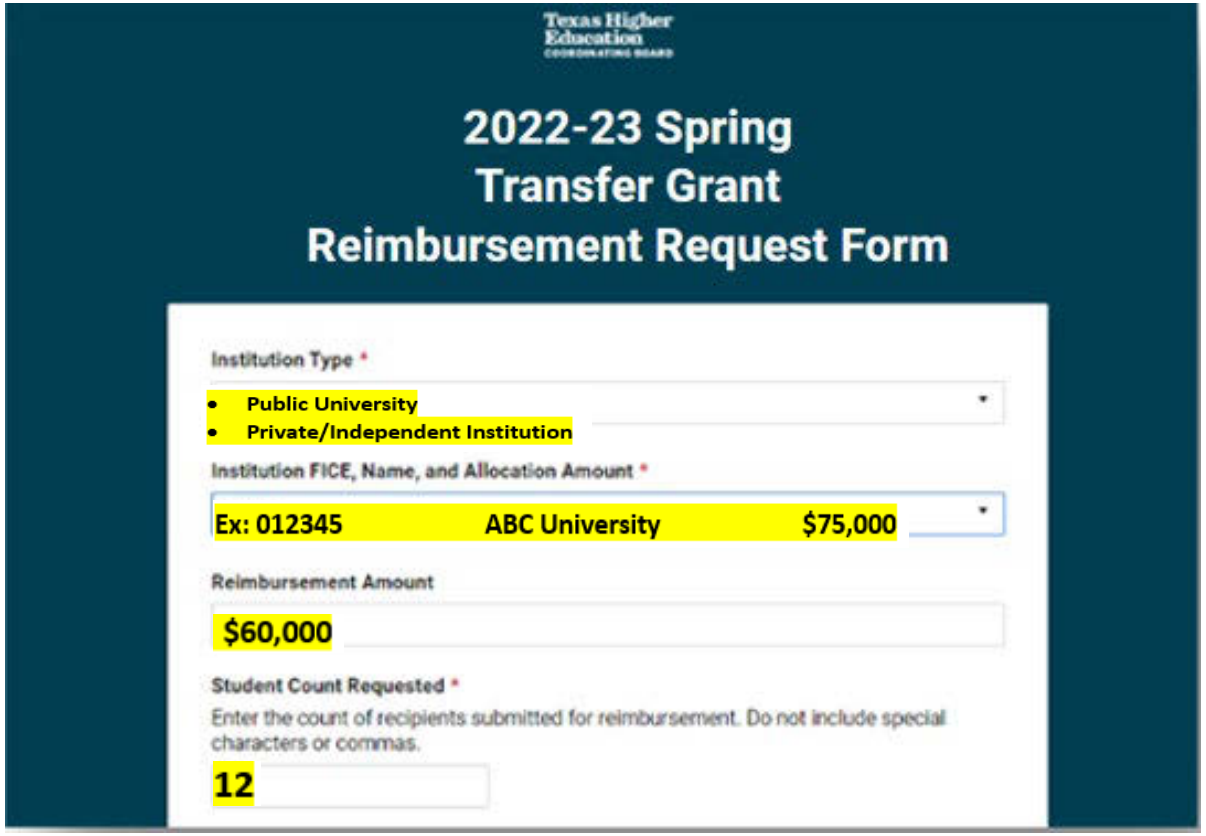
FICE (Enter 6-digit FICE)	SSN (SSN: No dashes)	LastName	FirstName	DOB (DOB: YYYYMMDD)	# Hours Enrolled through census	Disbursed Amount	Explanation - *ONLY if Disbursed Amount is less than $5000*
123456	*123456789*	*Example: Doe*	*John*	*19990406*	*9*	*$ 5,000.00*	
023456	*023456789*	*Example: Doe*	*Jane*	*19990302*	*9*	*$ 4,500.00*	*COA exceeded due to excess amounts in other need based.*

Save the file in the following format: 6-digit FICE_Institution_SpringYYYY
Example: 012345_ABCUniversity_Spring2023

Step Two: Reimbursement Request Form

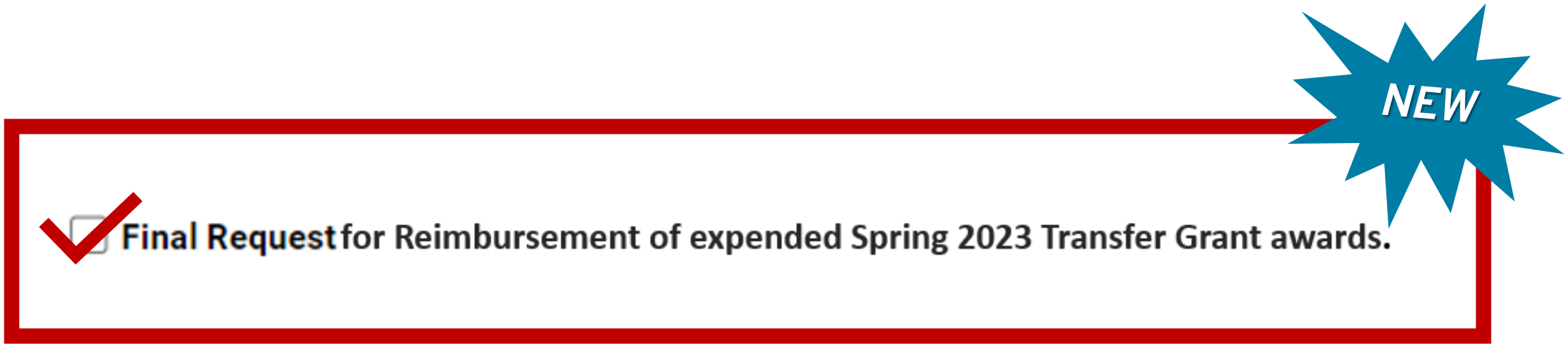
Complete ALL fields.

- Select **Institution Type.**
- Select **Institution FICE, Name,** and **Allocation Amount.**
- Enter total **Reimbursement Amount.**
- Enter **Student Count.**



2022-23 Spring Transfer GrantReimbursement Request Form (smartsheet.com)

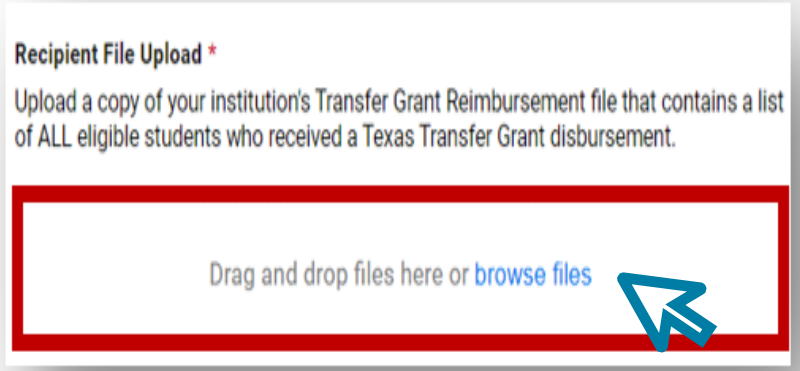
Final Request Submission



Select “Final Request” box when submitting your FINAL *(or ONLY)* request for reimbursement.

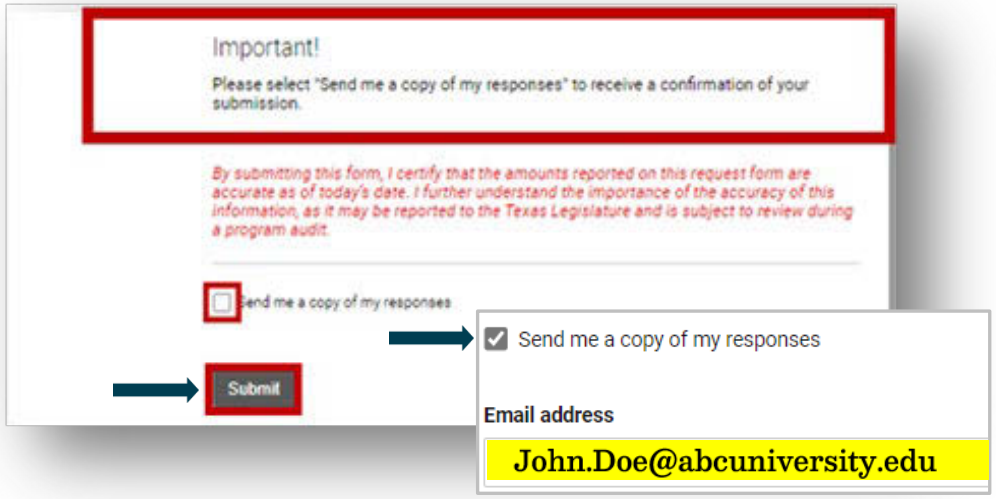
Step Three: Upload Reimbursement File

- Click **browse files**, or
- **Drag and drop** a copy into the file upload box



Step Four: Submit Request

- Click the box above the submit button to receive a copy of your responses
- Click **Submit** to send the form to the THECB



Submission Deadline

Submit all Spring 2023 Requests for Reimbursements to the THECB by the ***target*** deadline of **Feb. 28, 2023**.

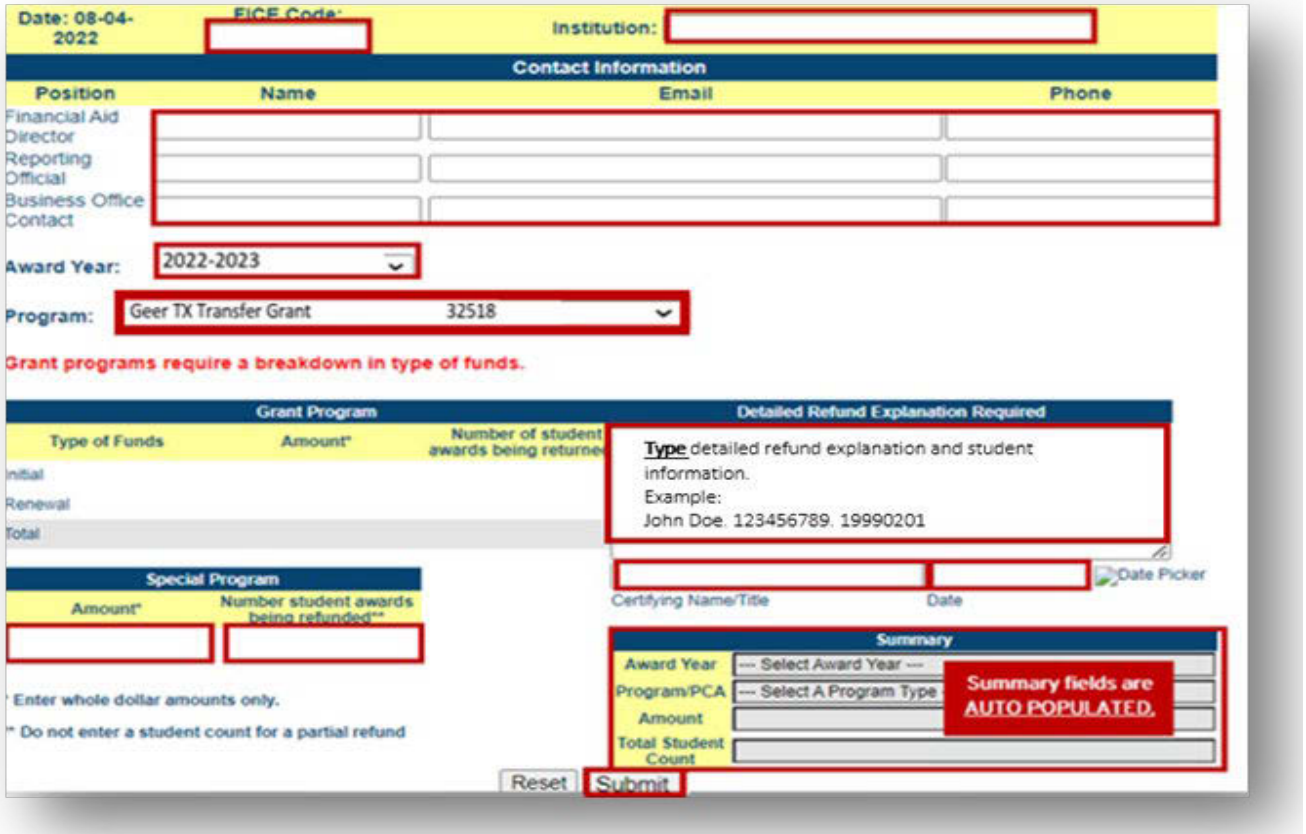
Returning Funds

Return of Funds Form (RFF)

Complete all required fields.

- FICE
- Institution Name
- Contact Information
- Award Year
- Program
- Amount
- Number student awards being refunded
- Detailed refund explanation (including student full Name, SSN, and DOB impacted by the refund)
- Name/Title of Certifying Official
- Date
- Click **Submit**

Grants and Special Programs

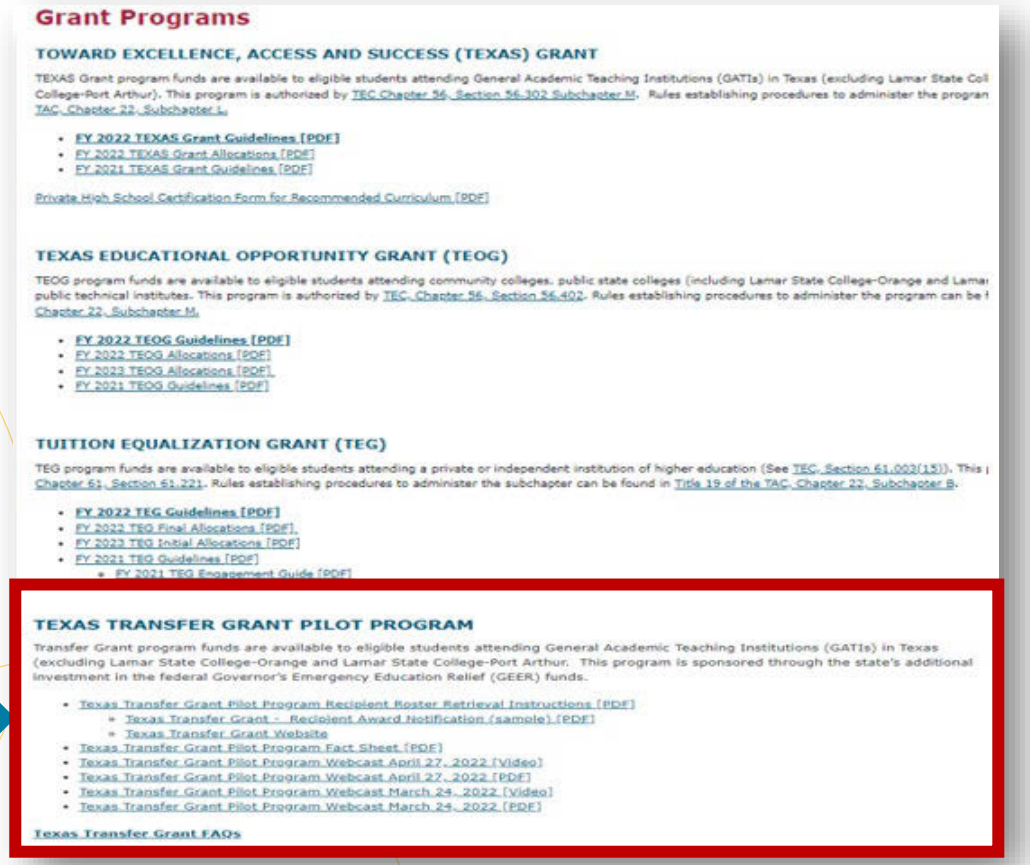


https://www1.thecb.state.tx.us/apps/SpecialPrograms/returnfunds.cfm

Additional Resources

Websites

Institutions



Grant Programs

TOWARD EXCELLENCE, ACCESS AND SUCCESS (TEXAS) GRANT

TEXAS Grant program funds are available to eligible students attending General Academic Teaching Institutions (GATIs) in Texas (excluding Lamar State Col College-Port Arthur). This program is authorized by TEC Chapter 56, Section 56.302 Subchapter M. Rules establishing procedures to administer the program TAC, Chapter 22, Subchapter L.

- FY 2022 TEXAS Grant Guidelines [PDF]
- FY 2022 TEXAS Grant Allocations [PDF]
- FY 2021 TEXAS Grant Guidelines [PDF]

Private High School Certification Form for Recommended Curriculum [PDF]

TEXAS EDUCATIONAL OPPORTUNITY GRANT (TEOG)

TEOG program funds are available to eligible students attending community colleges, public state colleges (including Lamar State College-Orange and Lamar public technical institutes. This program is authorized by TEC, Chapter 56, Section 56.402. Rules establishing procedures to administer the program can be f Chapter 22, Subchapter M.

- FY 2022 TEOG Guidelines [PDF]
- FY 2022 TEOG Allocations [PDF]
- FY 2023 TEOG Allocations [PDF]
- FY 2021 TEOG Guidelines [PDF]

TUITION EQUALIZATION GRANT (TEG)

TEG program funds are available to eligible students attending a private or independent institution of higher education (See TEC, Section 61.003(15)). This Chapter 61, Section 61.221. Rules establishing procedures to administer the subchapter can be found in Title 19 of the TAC, Chapter 22, Subchapter B.

- FY 2022 TEG Guidelines [PDF]
- FY 2022 TEG Final Allocations [PDF]
- FY 2023 TEG Initial Allocations [PDF]
- FY 2021 TEG Guidelines [PDF]
  - FY 2021 TEG Engagement Guide [PDF]

TEXAS TRANSFER GRANT PILOT PROGRAM

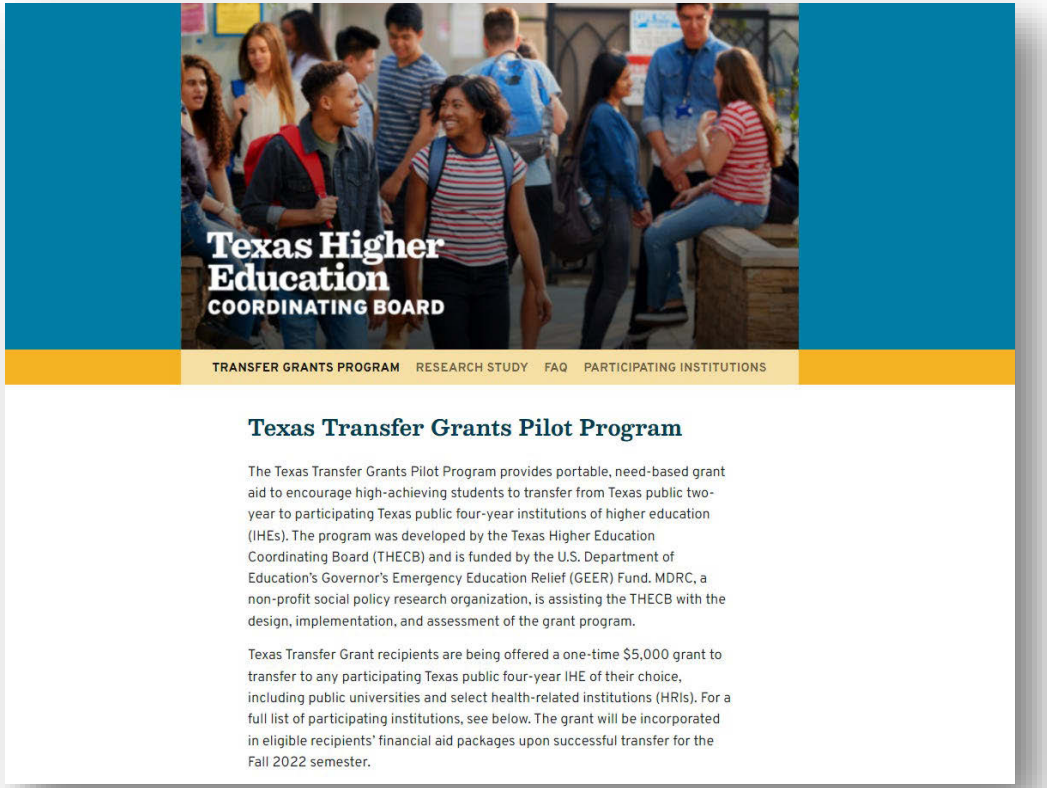
Transfer Grant program funds are available to eligible students attending General Academic Teaching Institutions (GATIs) in Texas (excluding Lamar State College-Orange and Lamar State College-Port Arthur. This program is sponsored through the state's additional investment in the federal Governor's Emergency Education Relief (GEER) funds.

- Texas Transfer Grant Pilot Program Recipient Roster Retrieval Instructions [PDF]
  - Texas Transfer Grant - Recipient Award Notification (sample) [PDF]
  - Texas Transfer Grant Website
- Texas Transfer Grant Pilot Program Fact Sheet [PDF]
- Texas Transfer Grant Pilot Program Webcast April 27, 2022 [Video]
- Texas Transfer Grant Pilot Program Webcast April 27, 2022 [PDF]
- Texas Transfer Grant Pilot Program Webcast March 24, 2022 [Video]
- Texas Transfer Grant Pilot Program Webcast March 24, 2022 [PDF]

Texas Transfer Grant FAQs

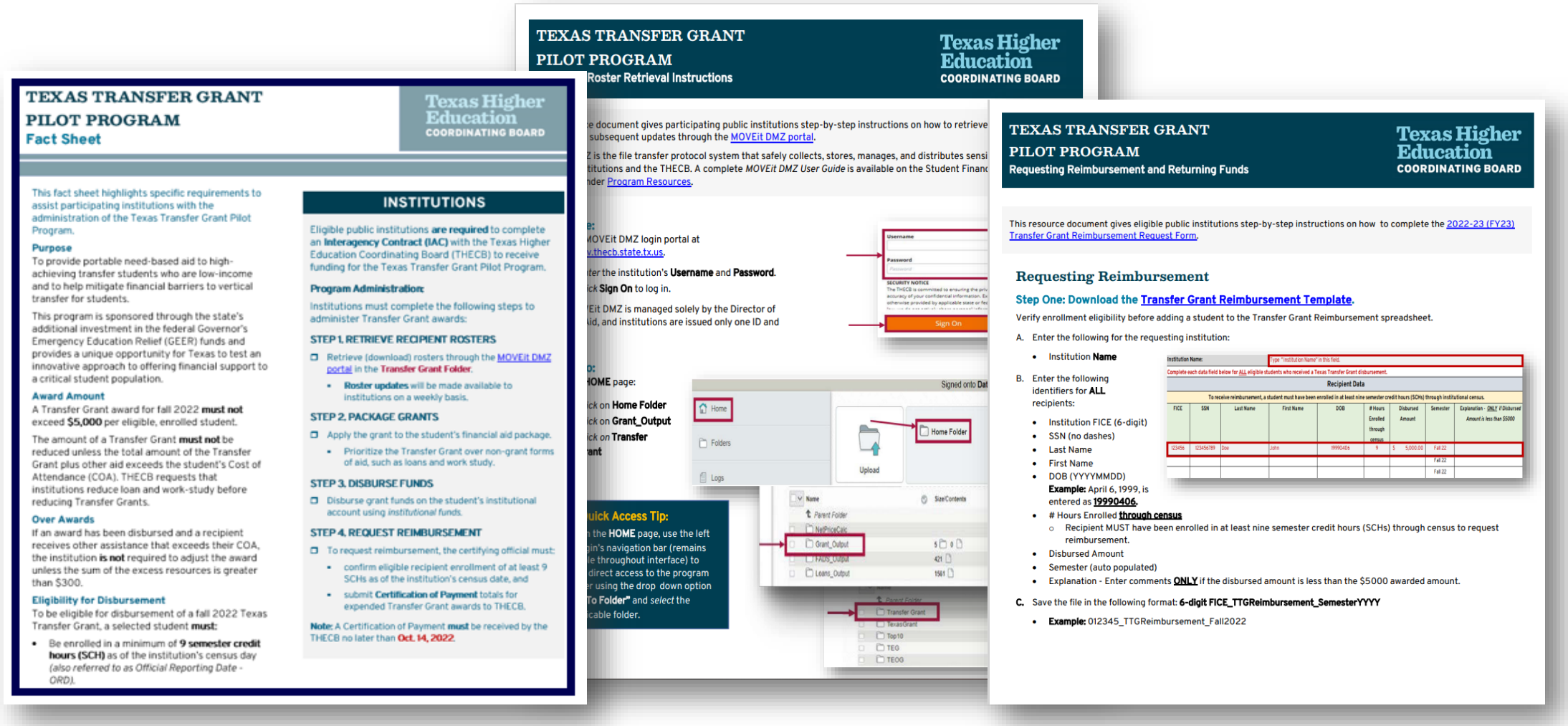
https://www.highered.texas.gov/our-work/supporting-our-institutions/student-financial-aid-programs/program-resources/grant-loan-programs/

Students



https://www.texastransfergrants.org/

Program Resources



TEXAS TRANSFER GRANT
PILOT PROGRAM
Fact Sheet

Texas Higher Education
COORDINATING BOARD

This fact sheet highlights specific requirements to assist participating institutions with the administration of the Texas Transfer Grant Pilot Program.

Purpose
To provide portable need-based aid to high-achieving transfer students who are low-income and to help mitigate financial barriers to vertical transfer for students.

This program is sponsored through the state's additional investment in the federal Governor's Emergency Education Relief (GEER) funds and provides a unique opportunity for Texas to test an innovative approach to offering financial support to a critical student population.

Award Amount
A Transfer Grant award for fall 2022 **must not** exceed **$5,000** per eligible, enrolled student.

The amount of a Transfer Grant **must not** be reduced unless the total amount of the Transfer Grant plus other aid exceeds the student's Cost of Attendance (COA). THECB requests that institutions reduce loan and work-study before reducing Transfer Grants.

Over Awards
If an award has been disbursed and a recipient receives other assistance that exceeds their COA, the institution **is not** required to adjust the award unless the sum of the excess resources is greater than $300.

Eligibility for Disbursement
To be eligible for disbursement of a fall 2022 Texas Transfer Grant, a selected student **must:**

- Be enrolled in a minimum of **9 semester credit hours (SCH)** as of the institution's census day *(also referred to as Official Reporting Date - ORD).*

INSTITUTIONS

Eligible public institutions **are required** to complete an **Interagency Contract (IAC)** with the Texas Higher Education Coordinating Board (THECB) to receive funding for the Texas Transfer Grant Pilot Program.

Program Administration:
Institutions must complete the following steps to administer Transfer Grant awards:

STEP 1. RETRIEVE RECIPIENT ROSTERS
- Retrieve (download) rosters through the MOVEit DMZ portal in the **Transfer Grant Folder**.
  - **Roster updates** will be made available to institutions on a weekly basis.

STEP 2. PACKAGE GRANTS
- Apply the grant to the student's financial aid package.
  - Prioritize the Transfer Grant over non-grant forms of aid, such as loans and work study.

STEP 3. DISBURSE FUNDS
- Disburse grant funds on the student's institutional account using *institutional funds.*

STEP 4. REQUEST REIMBURSEMENT
- To request reimbursement, the certifying official must:
  - confirm eligible recipient enrollment of at least 9 SCHs as of the institution's census date, and
  - submit **Certification of Payment** totals for expended Transfer Grant awards to THECB.

Note: A Certification of Payment **must** be received by the THECB no later than **Oct. 14, 2022**.

TEXAS TRANSFER GRANT
PILOT PROGRAM
Roster Retrieval Instructions

Texas Higher Education
COORDINATING BOARD

document gives participating public institutions step-by-step instructions on how to retrieve subsequent updates through the MOVEit DMZ portal.

is the file transfer protocol system that safely collects, stores, manages, and distributes sensi titutions and the THECB. A complete *MOVEit DMZ User Guide* is available on the Student Financ nder Program Resources.

MOVEit DMZ login portal at thecb.state.tx.us.

ter the institution's **Username** and **Password**.

ick **Sign On** to log in.

Eit DMZ is managed solely by the Director of id, and institutions are issued only one ID and

OME page:

ick on **Home Folder**
ick on **Grant_Output**
ick on **Transfer**
ant

uick Access Tip:
the **HOME** page, use the left in's navigation bar (remains e throughout interface) to direct access to the program r using the drop down option To Folder" and *select* the cable folder.

TEXAS TRANSFER GRANT
PILOT PROGRAM
Requesting Reimbursement and Returning Funds

Texas Higher Education
COORDINATING BOARD

This resource document gives eligible public institutions step-by-step instructions on how to complete the 2022-23 (FY23) Transfer Grant Reimbursement Request Form.

Requesting Reimbursement

Step One: Download the Transfer Grant Reimbursement Template.

Verify enrollment eligibility before adding a student to the Transfer Grant Reimbursement spreadsheet.

A. Enter the following for the requesting institution:
   - Institution **Name**

B. Enter the following identifiers for **ALL** recipients:
   - Institution FICE (6-digit)
   - SSN (no dashes)
   - Last Name
   - First Name
   - DOB (YYYYMMDD)
     Example: April 6, 1999, is entered as **19990406.**
   - # Hours Enrolled **through census**
     - Recipient MUST have been enrolled in at least nine semester credit hours (SCHs) through census to request reimbursement.
   - Disbursed Amount
   - Semester (auto populated)
   - Explanation - Enter comments **ONLY** if the disbursed amount is less than the $5000 awarded amount.

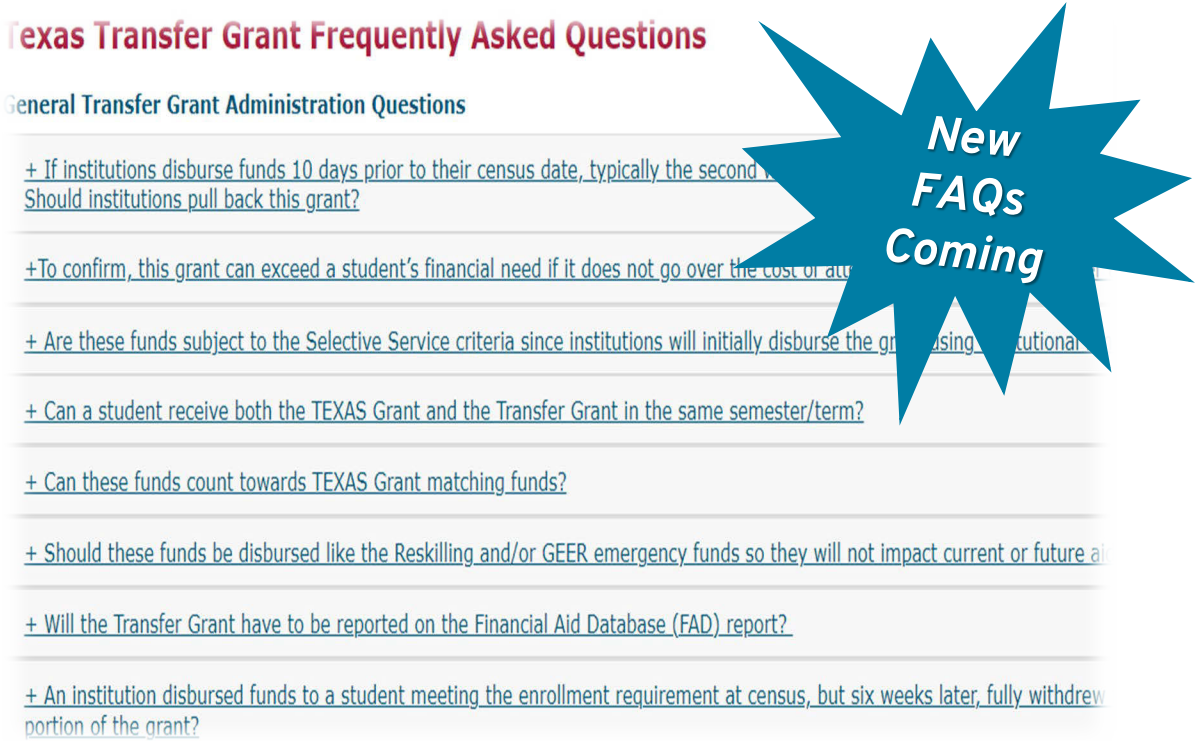
C. Save the file in the following format: **6-digit FICE_TTGReimbursement_SemesterYYYY**
   - **Example:** 012345_TTGReimbursement_Fall2022

Program Resources

Archived Webcasts

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

Transfer Grant FAQs



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

Contact Information

Contacting Student Financial Aid Programs

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 at any time.

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

Submitting a CONTACT US

To ensure inquiries are routed correctly, complete these steps:

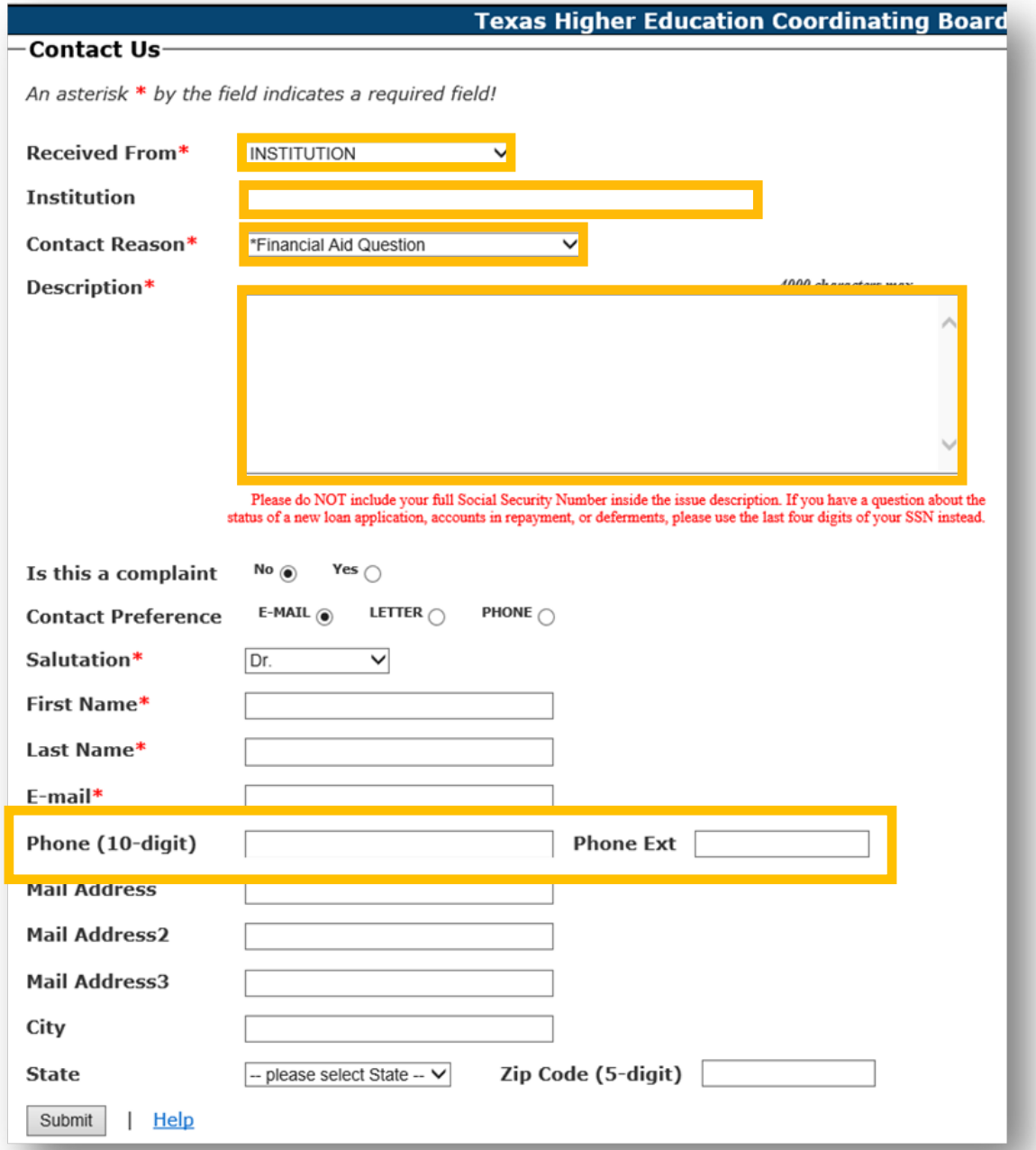
Select “Institution” in Received From box

Enter the institution’s full name

Always select “Financial Aid Question” as the Contact Reason

Enter in Description field: Transfer Grant Program

Provide the best direct phone number



Questions?