

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

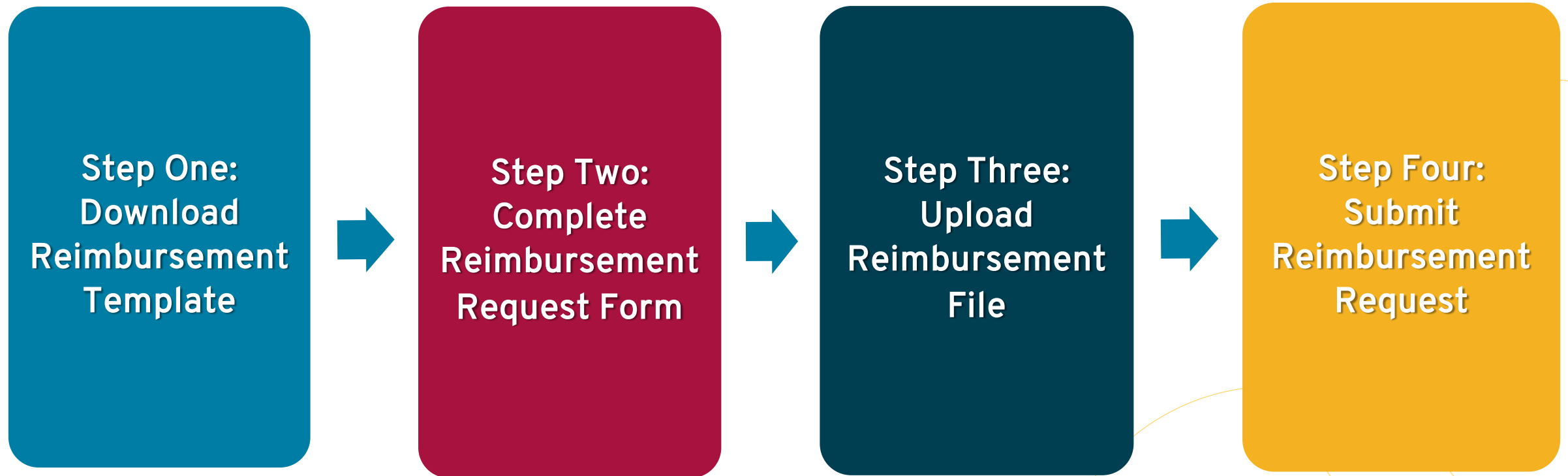
Q: Are Transfer Grant funds subject to the Selective Service criteria?

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.	Total Disbursed Amount:	\$ Auto Populated
ABC University		\$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	SSN	LastName	FirstName	DOB	# Hours Enrolled through census	Disbursed Amount	Explanation - <u>ONLY</u> if Disbursed Amount is less than \$5000
Enter 6-digit FICE	SSN: No dashes			DOB: YYYYMMDD			
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.

The screenshot shows a web form titled "2022-23 Spring Transfer Grant Reimbursement Request Form" with the Texas Higher Education Coordinating Board logo at the top. The form contains several input fields with yellow highlights indicating required or entered information:

- Institution Type ***: A dropdown menu with two options: "Public University" and "Private/Independent Institution".
- Institution FICE, Name, and Allocation Amount ***: A dropdown menu showing an example: "Ex: 012345 ABC University \$75,000".
- Reimbursement Amount**: A text input field containing "\$60,000".
- Student Count Requested ***: A text input field containing "12". Below this field is a note: "Enter the count of recipients submitted for reimbursement. Do not include special characters or commas."

[2022-23 Spring Transfer Grant Reimbursement Request Form \(smartsheet.com\)](https://smartsheet.com)

Final Request Submission

NEW

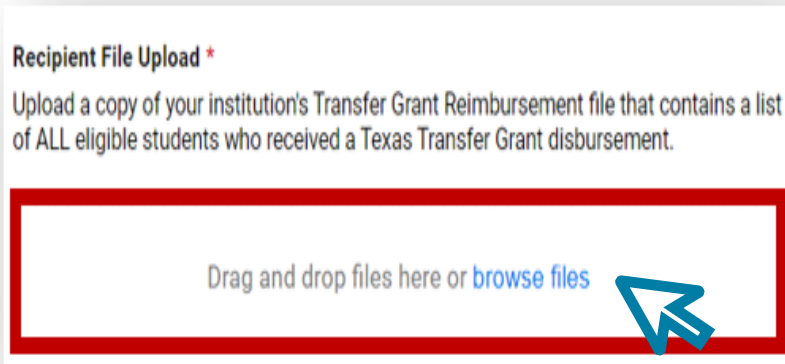


☐ Final Request for Reimbursement of expended Spring 2023 Transfer Grant awards.

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



Recipient File Upload *

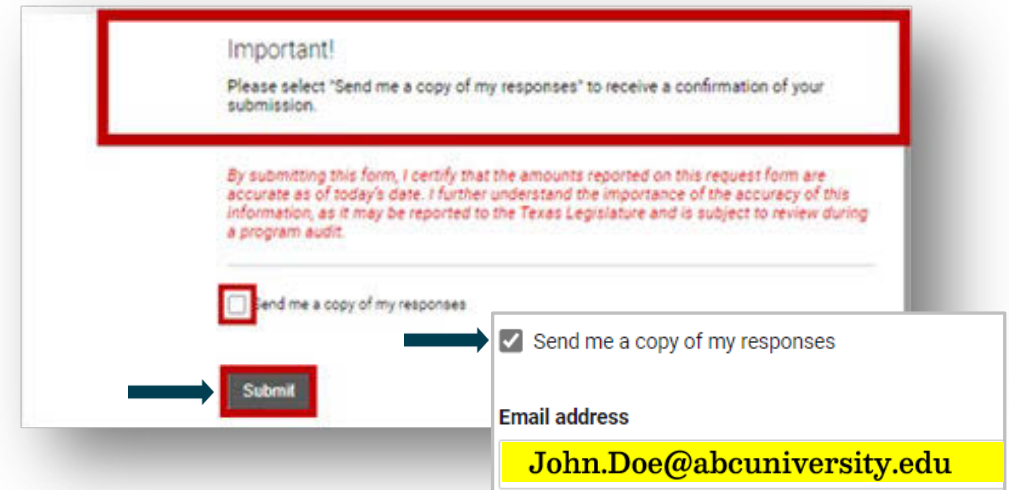
Upload a copy of your institution's Transfer Grant Reimbursement file that contains a list of ALL eligible students who received a Texas Transfer Grant disbursement.

Drag and drop files here or [browse files](#)

A red rectangular box highlights the file upload area. A blue mouse cursor arrow points to the 'browse files' link.

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



Important!

Please select "Send me a copy of my responses" to receive a confirmation of your submission.

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.

☐ Send me a copy of my responses

☒ Send me a copy of my responses

Submit

Email address

John.Doe@abcuniversity.edu

Arrows indicate the flow from the 'Submit' button to the 'Send me a copy of my responses' checkbox and then to the email address field.

Submission Deadline

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



Deadline

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

The screenshot shows the 'Return of Funds Form (RFF)' for 'Grants and Special Programs'. The form is divided into several sections with red boxes indicating required fields:

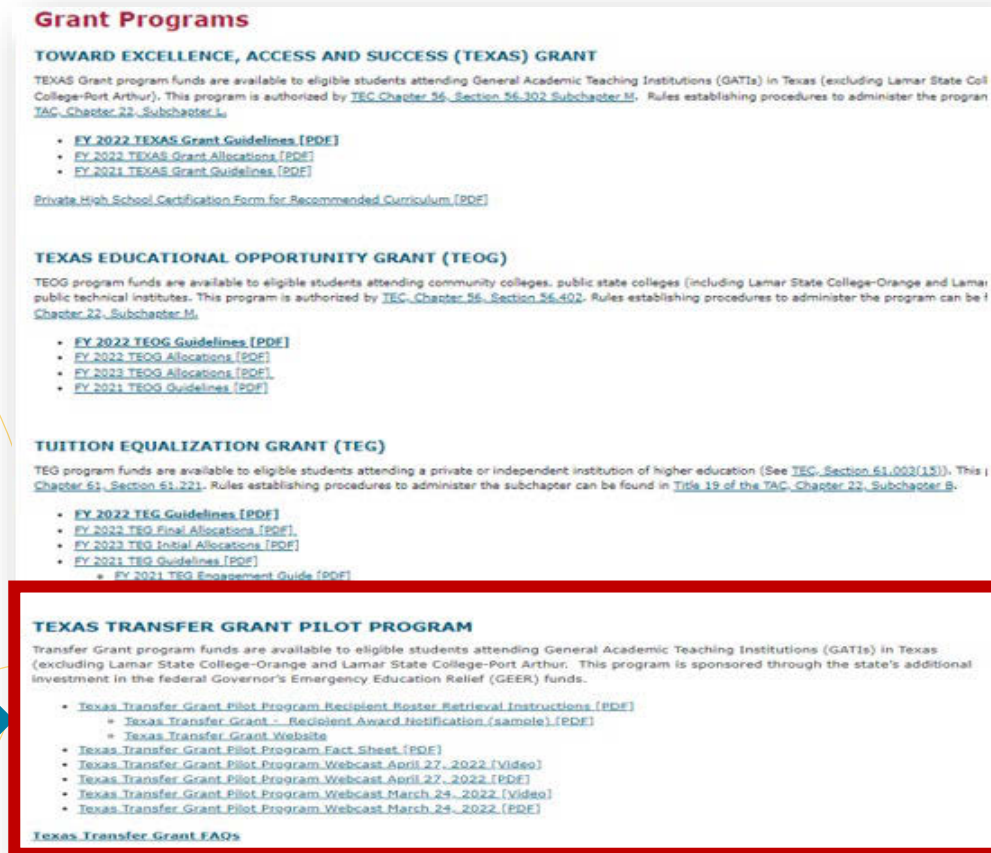
- Date:** 08-04-2022
- FICE Code:** [Red box]
- Institution:** [Red box]
- Contact Information:** Table with columns: Position, Name, Email, Phone. Rows: Financial Aid Director, Reporting Official, Business Office Contact. All Name, Email, and Phone fields are red boxes.
- Award Year:** 2022-2023 (dropdown)
- Program:** Geer TX Transfer Grant 32518 (dropdown)
- Grant programs require a breakdown in type of funds.**
- Grant Program:** Table with columns: Type of Funds, Amount*, Number of student awards being returned. Rows: Initial, Renewal, Total. All Amount* and Number of student awards being returned fields are red boxes.
- Special Program:** Table with columns: Amount*, Number student awards being refunded**. All Amount* and Number student awards being refunded** fields are red boxes.
- Detailed Refund Explanation Required:** Text area with a red box. Example: John Doe, 123456789, 19990201.
- Certifying Name/Title:** [Red box]
- Date:** [Red box]
- Summary:** Table with columns: Award Year, Program/PCA, Amount, Total Student Count. All Award Year, Program/PCA, Amount, and Total Student Count fields are red boxes. A red box with text 'Summary fields are AUTO POPULATED.' is also present.
- Buttons:** Reset, Submit (highlighted with a red box).

<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 College-Port Arthur). This program is authorized by [TEC Chapter 36, Section 36.302 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 36, Section 36.402](#). Rules establishing procedures to administer the program can be found [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 61.002\(13\)](#)). This is [Chapter 51, Section 51.221](#). Rules establishing procedures to administer the subchapter can be found in [Title 19 of the TAC, Chapter 27, 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

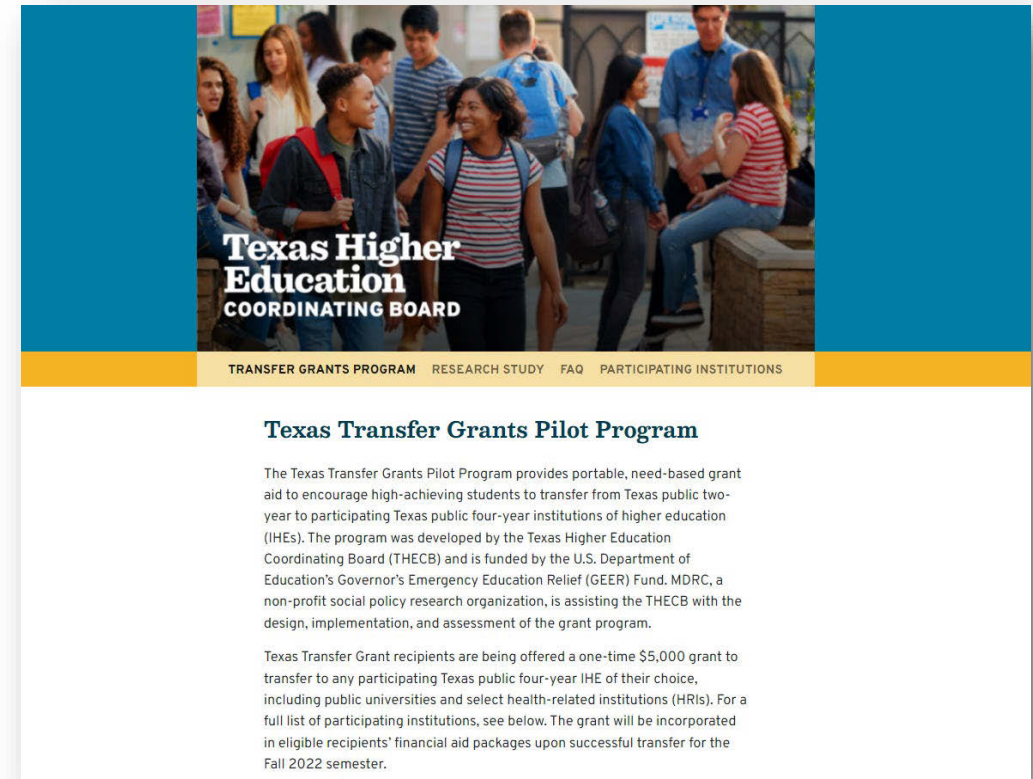
Transfer Grant program funds are available to eligible students attending General Academic Teaching Institutions (GATIs) in Texas (excluding Lamar State College-Orange and Lamar State College-Port Arthur). This program is sponsored through the state's additional investment in the federal Governor's Emergency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

- [Texas Transfer Grant Pilot Program Recipient Roster Retrieval Instructions \[PDF\]](#)
 - [Texas Transfer Grant - Recipient Award Notification \(samote\) \[PDF\]](#)
 - [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



Texas Higher Education COORDINATING BOARD

[TRANSFER GRANTS PROGRAM](#) [RESEARCH STUDY](#) [FAQ](#) [PARTICIPATING INSTITUTIONS](#)

Texas Transfer Grants Pilot Program

The Texas Transfer Grants Pilot Program provides portable, need-based grant aid to encourage high-achieving students to transfer from Texas public two-year to participating Texas public four-year institutions of higher education (IHEs). The program was developed by the Texas Higher Education Coordinating Board (THECB) and is funded by the U.S. Department of Education's Governor's Emergency Education Relief (GEER) Fund. MDRC, a non-profit social policy research organization, is assisting the THECB with the design, implementation, and assessment of the grant program.

Texas Transfer Grant recipients are being offered a one-time \$5,000 grant to transfer to any participating Texas public four-year IHE of their choice, including public universities and select health-related institutions (HRIs). For a full list of participating institutions, see below. The grant will be incorporated in eligible recipients' financial aid packages upon successful transfer for the Fall 2022 semester.

<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**

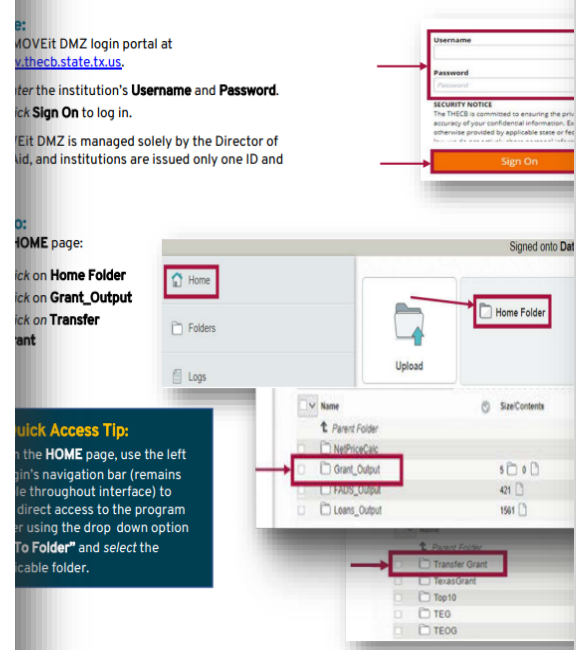
This document gives participating public institutions step-by-step instructions on how to retrieve subsequent updates through the [MOVEit DMZ portal](#).

MOVEit DMZ is the file transfer protocol system that safely collects, stores, manages, and distributes sensitive data between participating institutions and the THECB. A complete [MOVEit DMZ User Guide](#) is available on the Student Financial Services [Program Resources](#).

Step 1: Log in to the MOVEit DMZ portal
1. Go to the MOVEit DMZ login portal at [v.thecb.state.tx.us](#).
2. Enter the institution's **Username** and **Password**.
3. Click **Sign On** to log in.

Step 2: Navigate to the HOME page
1. After logging in, you will be directed to the HOME page.
2. Click on **Home Folder** in the left navigation bar.
3. Click on **Grant_Output** in the left navigation bar.
4. Click on **Transfer Grant** in the left navigation bar.

Quick Access Tip:
On the HOME page, use the left navigation bar (remains visible throughout interface) to direct access to the program or using the drop down option "To Folder" and select the applicable 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

Institution Name:

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

Recipient Data									
To receive reimbursement, a student must have been enrolled in at least nine semester credit hours (SCHs) through institutional census.									
FICE	SSN	Last Name	First Name	DOB	# Hours Enrolled through census	Disbursed Amount	Semester	Explanation - ONLY if Disbursed Amount is less than \$5000	
012345	0123456789	John	John	19990406	9	\$ 5,000.00	Fall 22		
							Fall 22		
							Fall 22		

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

Texas Transfer Grant Frequently Asked Questions

General Transfer Grant Administration Questions

- + If institutions disburse funds 10 days prior to their census date, typically the second week of the semester, should institutions pull back this grant?
- + To confirm, this grant can exceed a student's financial need if it does not go over the cost of attendance?
- + Are these funds subject to the Selective Service criteria since institutions will initially disburse the grant using institutional data?
- + Can a student receive both the TEXAS Grant and the Transfer Grant in the same semester/term?
- + Can these funds count towards TEXAS Grant matching funds?
- + Should these funds be disbursed like the Reskilling and/or GEER emergency funds so they will not impact current or future aid?
- + Will the Transfer Grant have to be reported on the Financial Aid Database (FAD) report?
- + An institution disbursed funds to a student meeting the enrollment requirement at census, but six weeks later, fully withdrew the student. What portion of the grant?

**New
FAQs
Coming**

<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

Texas Higher Education Coordinating Board

Contact Us

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

Received From* INSTITUTION

Institution

Contact Reason* *Financial Aid Question

Description*

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* Dr.

First Name*

Last Name*

E-mail*

Phone (10-digit) Phone Ext

Mail Address

Mail Address2

Mail Address3

City

State -- please select State -- Zip Code (5-digit)

| [Help](#)

Questions?