

2018-19 Program Guidelines Toward EXcellence, Access, & Success Grant (TEXAS Grant)



STUDENT FINANCIAL AID PROGRAMS
TEXAS HIGHER EDUCATION COORDINATING BOARD

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TOWARD EXCELLENCE, ACCESS AND SUCCESS GRANT


The Texas Higher Education Coordinating Board (THECB) Program Guidelines are intended to support institutions by highlighting requirements that appear in the Texas Education Code (TEC) and Title 19 of the Texas Administrative Code (TAC). When administering this program, institutions should always refer to the applicable statutes and rules. The information provided in this document is to be used solely as a resource and does not supersede the statute and/or rules for this program.

PROGRAM AUTHORITY AND PURPOSE ([19 TAC, SECTION 22.225](#))

The Toward EXcellence, Access, & Success (TEXAS) Grant program is authorized by [TEC Chapter 56, Section 56.302 Subchapter M](#). Rules establishing procedures to administer the program can be found in [Title 19 of the TAC, Chapter 22, Subchapter L](#). The program is funded by appropriations authorized by the Texas Legislature and from various revenue sources and gifts to the program. The purpose of the TEXAS Grant program is to provide financial aid assistance to enable eligible students to attend public institutions of higher education in this state.

STATE PRIORITY DEADLINE ([TEC, SECTION 56.008 AND 19 TAC, SECTION 22.6](#))

The THECB provides a uniform priority deadline for applications that qualify for financial assistance in an academic year. General Academic Teaching Institutions (GATIs) in Texas **must** publicize and use **March 15** as the state priority deadline for identifying eligible students to be given priority in receiving awards through the state financial aid programs. All other public institutions are *encouraged* to use this state priority deadline. Institutions may define how their students must meet the priority deadline. Institutions are encouraged to adopt a policy and procedure to ensure students are awarded consistently for this program.

 **ALERT NEW:** Beginning with the 2019-20 academic year and all years thereafter, all GATIs in Texas **must** publicize and use **January 15** as the state priority deadline.

NOTE: The 2019-20 Free Application for Federal Student Aid (FAFSA) and Texas Application for State Financial Aid (TASFA) will use **January 15, 2019** as the state priority deadline date.

ELIGIBLE INSTITUTIONS ([19 TAC, SECTION 22.227](#))

With the exception of public state colleges, GATIs and Health-Related Institutions (HRIs) are eligible to make both initial year (IY) and renewal year (RY) awards from a single allocation. Community colleges, public state colleges, and public technical institutes may only issue an RY awards to students who received an IY award prior to fall 2014 through a community college, public state college, or public technical institute.

ELIGIBILITY

INITIAL ELIGIBILITY REQUIREMENTS ([19 TAC, SECTION 22.228](#))

TO RECEIVE AN IY AWARD, 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 assistance
- ✓ Have financial need
- ✓ Have a 9-month expected family contribution (EFC) of no more than \$5,609
- ✓ Be enrolled at least 3/4 time
- ✓ Not have earned a baccalaureate degree
- ✓ Be enrolled in a baccalaureate degree program at a public 4-year or HRI institution as a first-time undergraduate and qualify through one of the following four pathways:
 - **High School Graduation Pathway:** Graduation from an accredited public or private high school* in Texas and enrollment at an approved institution within 16 months after high school graduation. The student must not have accumulated more than 30 semester credit hours (SCHs) (excluding credits for dual enrollment or by examination); **OR**
 - **Associate Degree Pathway:** Enrollment in an eligible institution within 12 months after earning an associate degree from a public or private nonprofit Texas institution of higher education ; **OR**
 - **Honorable Military Discharge Pathway:** Enrollment in an eligible institution of higher education within 12 months after being honorably discharged from military service. Enlistment in the military must have occurred within 12 months after graduation from an accredited public or private high school in Texas on May 1, 2013 or later; **OR**
 - **TEOG Transfer Pathway:** Completion of at least 24 SCHs with a minimum 2.5 GPA after receiving an IY Texas Educational Opportunity Grant (TEOG) in Fall 2014 or later and transferring to an eligible institution with a minimum 2.5 GPA.
- ✓ Not have been convicted of a felony or crime involving a controlled substance or under the law of any jurisdiction involving a controlled substance as defined by [Chapter 481, Health and Safety Code](#) (Texas Controlled Substances Act)

*To determine eligibility for a student that graduated from a private high school in Texas, the institution of higher education must receive a certification form from the private high school. This form verifies that the student completed the equivalent of the required high school curriculum. The [private high school certification form](#) is located on the THECB's website.

ADDITIONAL INFORMATION

HIGH SCHOOL RECIPIENT

Home-schooled students are not eligible for an initial award though the **High School Graduation Pathway**. Only students who graduated from an accredited public or private high school* in Texas are eligible for TEXAS Grant consideration as an initial applicant.

INITIAL RECIPIENT

If an initial TEXAS Grant recipient is paid funds but is later selected for verification (or voluntarily submits documentation) resulting in a new EFC that exceeds the maximum (\$5,609) requirement, the award must be cancelled. Funds should be awarded to another eligible student when possible.

TRANSFER STUDENTS

A student who is eligible through either the **Associate Degree** or **TEOG Transfer Pathway** does not need to have his or her high school transcripts evaluated, but cannot receive priority consideration for an initial TEXAS Grant award.

RENEWAL ELIGIBILITY REQUIREMENTS (19 TAC, SECTION 22.228)

TO RECEIVE AN RY AWARD, A STUDENT MUST:

- ✓ Be classified by the institution as a Texas resident
- ✓ Be registered with Selective Service, or be exempt
- ✓ Have financial need
- ✓ Be enrolled at least 3/4 time
- ✓ Maintain satisfactory academic progress
- ✓ Not have earned a baccalaureate degree
- ✓ Be a prior recipient of a TEXAS Grant award who is an undergraduate enrolled at a public institution who qualifies through one of the following three pathways:
 - Is enrolled as an undergraduate at a public 2-year institution and previously received a TEXAS Grant IY award **prior** to fall 2014 at a public 2-year institution;
OR
 - Is enrolled as an undergraduate in a baccalaureate program at a public 4-year institution or HRI and previously received a TEXAS Grant IY award **prior** to fall 2014 at a public 2-year institution, 4-year public institution, or HRI ;
OR
 - Is enrolled as an undergraduate in a baccalaureate program at a public 4-year institution or HRI and received a TEXAS Grant IY award in fall 2014 or later.
- ✓ Not have been convicted of a felony or crime involving a controlled substance or under the law of any jurisdiction involving a controlled substance as defined by [Chapter 481, Health and Safety Code](#) (Texas Controlled Substances Act)

ADDITIONAL INFORMATION

NEED ELIGIBILITY

If the student receives assistance that was not considered when determining the calculated need and the resulting sum of the assistance causes the student's need to be exceeded, the TEXAS Grant award must be adjusted if the sum of the excess resources is greater than \$300.

GRADUATE HOURS

An undergraduate student who is enrolled in both graduate and undergraduate hours is eligible for a TEXAS Grant award if all other eligibility requirements are met and the combined number of hours meets the 3/4 time enrollment condition.

SELECTIVE SERVICE STATEMENT (19 TAC, SECTION 22.3)

! ALERT NEW: STUDENT COMPLIANCE WITH SELECTIVE SERVICE

A male student cannot receive a grant, scholarship, loan or other financial assistance funded by state revenue, unless a statement of the individual's selective service status is completed with the institution or other entity granting or guaranteeing the financial assistance. This requirement also includes federal funds or gifts and grants accepted by this state and any loans guaranteed by the state of Texas (See [TEC, 51.9095](#)).

Typically, a student's selective service status is confirmed through the online FAFSA process which validates registration directly with the Selective Service Administration. If a student's selective service status is confirmed on the Institutional Student Information Record (ISIR), no statement needs to be collected by the institution.

The statement below **must** be collected for all male applicants, each academic year, in the following situations:

- A FAFSA that is flagged "not registered" must be reviewed by the institution to determine if the student is exempt and may be eligible for federal or state financial aid programs. If the student is **exempt**, additional documentation should be collected by the institution to verify the circumstances. The institution can determine what additional documentation to collect for this verification.
- For a student that does not complete a FAFSA, the required statement and back-up documentation must be collected by the institution to verify the current selective service status if the individual is applying for any state financial aid.

NOTE: The institution has discretion to determine how to collect this required statement, which can be done electronically or on paper (e.g. online form, signed award letter, etc.). The statement and all documentation must be retained in the student's record and be made available if requested during a program review or audit. Each statement collected must be retained with the student's records for 7 years after the date of completion for the applicable award period (See [TAC, Section 22.4\(a\)\(2\)\(A\)](#)).

Required Statement of Selective Service Status

Are you currently registered for Selective Service, as required by federal law?

Registered Not Registered Exempt

(Proof of registration required) (Documentation required)

I, _____, hereby certify that the selective service status provided is true and correct. I understand that I must provide documentation if requested by my institution that I may be required to complete a new statement for each academic year for continued eligibility.

Student Signature

Date

CONTROLLED SUBSTANCE RESTRICTIONS (19 TAC, SECTION 22.230)

A person is not eligible to receive an IY or RY TEXAS Grant if the person has been convicted of a felony or an offense under Chapter 481, Health and Safety Code (Texas Controlled Substances Act), or under the law of any other jurisdiction involving a controlled substance as defined by Chapter 481, Health and Safety Code, unless the person has met the other applicable eligibility requirements under this subchapter and has:

1. Received a certificate of discharge by the Texas Department of Criminal Justice or a correctional facility or completed a period of probation ordered by a court, and at least two years have elapsed from the date of the receipt or completion; **or**
2. The student has been pardoned or the record of the offense has been expunged from the student’s record and therefore the student has been released from the resulting ineligibility to receive a TEXAS Grant.

Institutions are required to collect a statement (electronic or paper) from each TEXAS Grant recipient prior to the disbursement of funds confirming eligibility in regard to the controlled substance restrictions of the program. This statement must be retained with the student’s records at the institution and be made available if requested in the course of a program review or audit. Each statement collected must be retained with the student’s records for 7 years after the date of completion for the applicable award period (See [TAC, Section 22.4\(a\)\(2\)\(A\)](#)).

As long as a statement can be produced to prove a recipient’s eligibility for a given award period, the institution has the flexibility to determine the wording of the statement and the frequency with which it is collected. The institution can require all TEXAS Grant recipients to complete the statement every year they receive a TEXAS Grant award. The institution can also choose to collect the statement at least once from each TEXAS Grant recipient at the institution and word the statement in such a way to indicate that by signing, the student agrees that it is his/her responsibility to inform the institution if his/her status changes in the future. By choosing the second option, the institution can limit the statement required each year to initial or incoming recipients at the institution.

A **sample** statement is being provided:

Statement of Student Eligibility

Have you ever been convicted of a felony or an offense under Chapter 481, Health and Safety Code (Texas Controlled Substances Act), or under the law of another jurisdiction involving a controlled substance as defined by Chapter 481, Health and Safety Code?

_____ Yes* _____ No**

* If your answer is yes, contact the financial aid office to determine your eligibility to receive a TEXAS Grant.
** If your answer is no, it is your responsibility to inform the financial aid office if this status changes at any time while attending the institution.

I hereby certify that the information I have provided in this statement is true and correct. I understand that if I fail to provide accurate information, I may be required to reimburse the institution and penalties may be imposed. I also understand that it is my responsibility to inform the financial aid office if my status concerning this statement of eligibility changes at any time while attending this institution.

Student Signature

Date

DISCONTINUATION OF ELIGIBILITY ([19 TAC, SECTION 22.230](#))

Unless an extension of eligibility (due to a hardship circumstance) is granted, a student’s eligibility ends if any of the following maximums have been met, or the student earns a baccalaureate degree, whichever comes first.

| PATHWAY | IF ENROLLED IN A DEGREE PLAN OF 4 YEARS OR LESS | IF ENROLLED IN A DEGREE PLAN OF MORE THAN 4 YEARS | ATTEMPTED HOURS** | HOURS WHILE RECEIVING GRANT FUNDS |
|--|---|---|-------------------|---------------------------------------|
| INITIAL RECIPIENT BY: <ul style="list-style-type: none"> • ASSOCIATE DEGREE | 3 years from the first semester awarded | 4 years from the first semester awarded | 150 SCH | 90 SCH No hardship allowed |
| INITIAL RECIPIENT BY: <ul style="list-style-type: none"> • HIGH SCHOOL GRADUATE • TEOG TRANSFER • MILITARY DISCHARGE | 5 years from the first semester awarded | 6 years from the first semester awarded | 150 SCH | 150 SCH No hardship allowed |

****Attempted hours** is defined as every course in every semester for which a student has been registered as of the official census date. This includes, but is not limited to, repeated courses, courses the student drops, or those from which the student withdraws. Transfer hours and hours for optional internship and cooperative education courses are included if they are accepted by the receiving institution as counting towards the student's current program of study (See [19 TAC, Section 22.230](#)).

HARDSHIP PROVISIONS ([19 TAC, SECTION 22.231](#))

A student who is ineligible for a TEXAS Grant based on the requirements for the grade point average (GPA), number of completed hours, or total hours enrolled may be deemed eligible under a hardship provision. Each institution must adopt a hardship policy and have the policy available for public review. All hardship decisions must be documented in the student’s record and be available for submission to the THECB, if requested.



STOP: A prorated award may be issued to a student who is enrolled in six to eight hours in the last semester of his or her degree program. However, no student enrolled for fewer than six hours may receive a TEXAS Grant award, regardless of the circumstances including graduation.

SATISFACTORY ACADEMIC PROGRESS (SAP) (19 TAC, SECTION 22.229)

At the end of the first academic year, a student must meet SAP requirements set by the institution to be eligible for a first RY award.

At the end of the second academic year, and all subsequent years, a student must have completed 24 SCHs and have a minimum 2.5 cumulative GPA.

The chart below reflects these requirements, which must be monitored to ensure compliance:

| ACADEMIC YEAR | SAP REQUIREMENTS | |
|---|------------------------|---------------------------------------|
| END OF 1ST ACADEMIC YEAR | Institution SAP policy | |
| END OF 2ND ACADEMIC YEAR AND ALL SUBSEQUENT YEARS | Complete 24 SCH | 2.5 cumulative GPA on a 4-point scale |

AWARDING

! ALERT NEW: ELIMINATION OF REALLOCATION PROCESS

Beginning in the 2018-19 award year, institutions will now have until the close of business on **August 1** (or the first working day thereafter if it falls on a weekend or holiday) to request program funds. The prior process in February will no longer be used to reallocate grant funding.

Each biennium*, funds not requested in the first year can be rolled-over for use in the second. However, funds for the second year of the biennium cannot be requested in advance during the first. Any funds not requested in the second year of the biennium become available for grant processing determined by the THECB.

**A biennium is defined as a two-year period designated to spend appropriated funds by the Legislature to be allocated to the institutions.*

If allocated funds are insufficient to award all eligible students, first priority must be given to students who are eligible for an RY award (See [19 TAC, Section 22.232](#)).

After all eligible RY awards have been funded; remaining allocations should be awarded to IY students in a manner that acknowledges the Priority Model and priority deadline expectations:

- Students meeting the Priority Model requirements who also meet the March 15 state priority deadline should be awarded first.
- If funding remains, the next students to be awarded are those who met the March 15 state priority deadline, but who did not meet the Priority Model requirements.
- The balance of remaining funding can be awarded to any eligible student.

In determining who should receive an IY TEXAS Grant award, an institution must give highest priority to students who demonstrate the greatest financial need at the time the award is made (See [19 TAC, Section 22.233](#)).

ADDITIONAL INFORMATION

GPA APPEALS

A student who does not meet the GPA requirement at the end of a spring term may appeal to have courses taken at other institutions included in the GPA calculation. In this case, all grade points previously earned must be included in the overall GPA calculation.

FIRST YEAR APPEALS

If a student completes the first year on academic warning, probation, or on an approved plan, the student can be considered meeting SAP, if the institution’s policy includes such provisions. However, at the end of the second year, the student must meet the program SAP requirements for continued eligibility.

FAILING COURSES

The intent of the 24 SCH requirement is to encourage timely progression towards a degree. Since a grade of **F** is not earned toward a degree, it should not be considered when calculating the student completed hours.

Institutions are encouraged to use the target award amounts to assist as many students as possible.

| TEXAS GRANT 2018-19 AWARD MAXIMUMS | | | | |
|------------------------------------|----------|--------------|-----------------|---------------------|
| INSTITUTION TYPE | YEAR MAX | SEMESTER MAX | TARGET YEAR MAX | TARGET SEMESTER MAX |
| PUBLIC UNIVERSITIES, HRIS | \$9,348 | \$4,674 | \$5,000 | \$2,500 |
| PUBLIC STATE COLLEGES | \$5,862 | \$2,931 | \$5,000 | \$2,500 |
| PUBLIC TECHNICAL INSTITUTES | \$5,590 | \$2,795 | \$2,500 | \$1,250 |
| PUBLIC COMMUNITY COLLEGES | \$3,150 | \$1,575 | \$1,325 | \$663 |

PRIORITY AWARD MODEL REQUIREMENTS (19 TAC, SECTION 22.228)

To receive priority consideration for an IY award through the TEXAS Grant program, an eligible student must meet at least **one** high school graduation requirement in **at least two** of the following **four** areas:

| AREA | HIGH SCHOOL GRADUATION REQUIREMENTS |
|---------------------------|--|
| ADVANCED ACADEMIC PROGRAM | <ul style="list-style-type: none"> 12 Hours of College Credit (Dual Credit or AP Courses), Complete the Recommended or Advanced High School Program or its equivalent Complete the International Baccalaureate (IB) Program |
| TSI READINESS | <ul style="list-style-type: none"> Meet the Texas Success Initiatives (TSI) assessment thresholds or qualify for an exemption |
| CLASS STANDING | <ul style="list-style-type: none"> Graduate in the top 1/3 of the HS graduating class Graduate with a GPA of at least 3.0 on a 4-point scale or the equivalent |
| ADVANCED MATH | <ul style="list-style-type: none"> Complete at least one math course beyond Algebra II Complete at least one advanced career and technical or technical applications course, as determined by the Texas Education Agency (TEA) |

ADDITIONAL INFORMATION

PRIORITY

There is no hierarchy within the priority model areas. However, there is a priority deadline of March 15th. Institutions are required to give priority for IY TEXAS Grant funds to students meeting the priority model requirements and the priority deadline. If funds remain after all eligible priority students meeting the priority deadline have been awarded, the balance of funds can go to students meeting the basic requirements.

MATCHING

A student who is a recipient of both a TEXAS Grant and Exemption/Waiver, owes a decreased amount of tuition and fees. Institutions are required to cover, with matching funds, only the balance of tuition and fees not covered by TEXAS Grant.

For example:

An institution would not be required to provide matching funds in excess of the TEXAS Grant award for a student who is exempt from the total cost of tuition and fees.

REQUIRED MATCHING (19 TAC, SECTION 22.234)

Institutions are required to cover any tuition and required fees that are not covered by the amount of the TEXAS Grant using other funds, which may include any non-loan program funds awarded to the student from federal, state, institutional, or outside sources. Funds used for this purpose are frequently referred to as “matching funds”.

! ALERT NEW: A **Required Fee**, for the purpose of administering the TEXAS Grant Program, includes mandatory fees (required by statute) or discretionary fees (authorized by statute, imposed by the governing board of an institution) and fees that an institution charges to a student as a condition of enrollment at the institution or in a specific course.

OVER AWARDS (19 TAC, SECTION 22.234)

If an award has been disbursed and a student receives other assistance that exceeds the student’s financial need, the institution is not required to adjust the award unless the sum of the excess resources is greater than \$300.

LATE DISBURSEMENTS (19 TAC, SECTION 22.235)

Funds that are disbursed after the end of a student’s period of enrollment must be used either to pay the student’s outstanding balance for the period of enrollment, or to make a payment on an outstanding loan received during that period of enrollment. Under no circumstances should funds be released directly to the student in this situation.

PRORATION (19 TAC, SECTION 22.234)

Award amounts must be prorated under the following circumstances:

- Student is enrolled less than 3/4 time, but at least 1/2 time, with an extension of eligibility (due to a hardship circumstance).

| | |
|------------------------------------|--|
| HARDSHIP PRORATION SCHEDULE | Divide the maximum award for the semester by 12 and multiply by the number of hours enrolled (6-8 hours) |
|------------------------------------|--|

- The balance of either total attempted hours **or** eligible program hours while receiving grant funds is less than the total number of hours the student is enrolled.

| | |
|--|--|
| BALANCE OF TOTAL ATTEMPTED HOURS (150 SCH) | Balance of hours = 6-8 hours: 50% of the maximum award Balance of hours = 1-5 hours: 25% of the maximum award |
| BALANCE OF ELIGIBLE PROGRAM HOURS (150 OR 90 SCH) | |

For Example: A student has 147 hours and 3 eligible hours remaining. The 3 hours would be prorated using the chart above.

PROCESSING FUNDS

REQUESTING PROGRAM FUNDS

When requesting funds, institutions must submit a [Funds Request Form \(FRF\)](#). This form is available through the secure Coordinating Board Pass System (CBPASS) portal on the Student Financial Aid Programs Information Webpage.

RETURNING PROGRAM FUNDS

A [Return of Funds Form \(RFF\)](#) must be submitted and approved before any funds are returned to the THECB. This form is available on the Student Financial Aid Programs Information Webpage under **Online Resources**.



STOP: TIMELY DISTRIBUTION OF FUNDS ([19 TAC, Section 22.2](#))

- Institutions have 3 business days after receiving the funds to apply the funds to a student’s account
- Institutions have 6 business days after receiving the funds to return undisbursed funds
- Institutions have 45 calendar days from the date a student becomes ineligible to return disbursed funds
- Institutions have 120 calendar days to return funds after a student has notified the institution of a decision to cancel the award

AUTHORITY TO TRANSFER FUNDS ([19 TAC, SECTION 22.239](#))

! ALERT: Institutions participating in TEXAS Grant and Texas College Work-Study (TCWS) may transfer up to 10% of the institution’s total annual program allocation or \$20,000 (whichever is less) between programs within the relevant fiscal year. Institutions requesting a transfer between programs must submit an [Authority to Transfer Form](#) by **January 18**.

If the institution transfers TEXAS Grant funds to TCWS, the transferred TCWS funds must be encumbered by **February 20**. If funds are being transferred from TCWS to TEXAS Grant, the institutions must first return the TCWS funds to the THECB by **January 18** but will have until **August 1** to request the transferred funds.

| FROM | TO | Deadline to Encumber |
|----------------------------|---|--|
| TEXAS Grant TEOG TEG | <div style="background-color: black; color: white; padding: 5px; text-align: center; font-weight: bold; margin: 0 auto;">OR</div> | TCWS FEBRUARY 20 |
| TCWS | <div style="background-color: black; color: white; padding: 5px; text-align: center; font-weight: bold; margin: 0 auto;">OR</div> | TEXAS Grant TEOG TEG AUGUST 1 |

Funds can only be transferred from a grant to TCWS or vice versa, never from a grant to a grant.

APPENDIX 1: QUICK REFERENCES

| CONTACT FINANCIAL AID SERVICES | |
|---|--|
| By phone: (844) 792-2640 | |
| Contact us by completing an online inquiry form and select “Financial Aid Question” as the Contact Reason. | |
| OTHER RESOURCES FOR INSTITUTIONS | |
| General program information for institutions | Student Financial Aid Programs Information Webpage |
| General loan information | HHloans |
| Texas Program Statutes | Texas Education Code |
| Texas Program Rules | Texas Administrative Code |
| Information concerning programs, procedures, allocations, and other topics will be communicated to institutions through the GovDelivery system. To receive these communications, interested individuals must subscribe. | GovDelivery |
| Federal Selective Service Requirement Guide | Who Must Register Chart |
| AVAILABLE FORMS | |
| TEXAS Grant, TEOG, TEG, and TCWS | Authority to Transfer |
| A form is required when requesting funds for all state grant, Bilingual Education, and Educational Aide Exemption program funds. | Funds Request Form |
| A form is required when returning funds for all state grant, scholarship, Educational Aide Exemption, and loan program funds. | Grants and Special Programs Online Return of Funds Form Loan Programs Online Return of Funds Form |
| CALENDAR | |
| Institutional Calendar | |