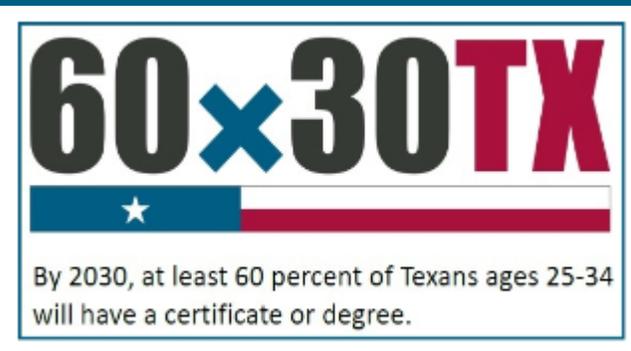


2016-17

Program Guidelines

TEXAS Grant

(Toward EXcellence, Access, & Success Grant)



State Financial Aid
Texas Higher Education Coordinating Board

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TOWARD EXCELLENCE, ACCESS AND SUCCESS GRANT PROGRAM

The Program Guidelines discussed in this document are intended to support institutions by outlining the basic concepts that are written in the Texas Education Code (TEC) and Title 19 of the Texas Administrative Code (TAC). The program statutes and rules should always be used by an institution when administering this program. The guideline 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 \(TAC, Section 22.225\)](#)

The Toward EXcellence, Access, & Success (TEXAS) Grant program is authorized by [Chapter 56, Section 56.302 of Subchapter M of the Texas Education Code](#). Rules establishing procedures to administer the subchapter can be found in [Chapter 22, Subchapter L of the Texas Administrative Code](#). 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 \(TEC, Section 56.008\)](#)

The Texas Higher Education Coordinating Board (THECB) provides a uniform priority deadline for applications that qualify for financial assistance in an academic year. General Academic Teaching Institutions (GATIs) in Texas as defined in [TEC, Section 61.003](#) **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 have the flexibility to define what it means to meet the priority deadline at their institution. It is encouraged that institutions adopt a policy and procedure to ensure students are awarded consistently for this program.

[Eligible Institutions \(TAC, Section 22.227\)](#)

GATIs (excluding Lamar State College-Orange and Lamar State College-Port Arthur) and Health-Related Institutions (HRIs) are eligible to make both initial year (IY) and renewal year (RY) awards from a single allocation. Community college, public state college, and public technical colleges will be funded based on unused TEXAS Grant funds for those students who meet the eligibility criteria for a RY award. These RY awards can only be given to students who received an IY award prior to fall 2014 through a community college, public state college, or public technical college.

ELIGIBILITY

TEXAS Grant Eligibility Requirements ([TAC, Section 22.226](#) and [Section 22.228](#))

To receive an IY award, a student must meet the following requirements:	To receive a RY award, a student must meet the following requirements:
<ul style="list-style-type: none">✓ Be an entering undergraduate student enrolled in a baccalaureate program at a public 4-year or HRI institution who can be categorized in one of the following four pathways:<ul style="list-style-type: none">• Graduated from an accredited public or private high school* in Texas having completed at least the Foundation program and enrolled at an approved institution within 16 months from high school graduation having not accumulated more than 30 semester credit hours (SCHs) (excluding credits for dual enrollment or by examination); OR• Earned an associate degree from a public or private nonprofit institution of higher education in Texas, and enrolled in an eligible institution within 12 months after obtaining an associate degree; OR• Graduated from an accredited public or private high school in Texas May 1, 2013 or later, having completed at least the Foundation program and enlisted in military service within 12 months of high school graduation and enrolled in an eligible institution within 12 months of receiving an honorable discharge; OR• Received an IY Texas Educational Opportunity Grant (TEOG) in Fall 2014 or later and transferred to an eligible institution with minimum 2.5 GPA, and having completed at least 24 SCH's; AND✓ Be enrolled at least $\frac{3}{4}$ time✓ Not have earned a baccalaureate degree✓ Be registered with Selective Service, or be exempt✓ Demonstrate financial need✓ Have applied for any available financial aid assistance✓ Have a 9-month expected family contribution (EFC) of no more than \$5,233✓ Be classified by the institution as a Texas Resident✓ 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)	<ul style="list-style-type: none">✓ Be an undergraduate student at a public 2-year institution who previously received a TEXAS Grant IY award prior to fall 2014 at a public 2-year institution; OR✓ Be an undergraduate student at a public 4-year or HRI institution who previously received a TEXAS Grant IY award prior to fall 2014 at a public 2-year, 4-year, or HRI institution; OR✓ Be an undergraduate student enrolled in a baccalaureate program at a public 4-year or HRI institution who received a TEXAS Grant IY award fall 2014 or later; AND✓ Be enrolled at least $\frac{3}{4}$ time✓ Not have earned a baccalaureate degree✓ Be registered with Selective Service, or be exempt✓ Demonstrate financial need✓ Be classified by the institution as a Texas Resident✓ Maintain satisfactory academic progress✓ 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)

*In order to determine eligibility for a student that graduated from a private high school in Texas, a certification form must be submitted by the private high school to the institution the student plans to attend. This form verifies that the student completed the equivalent of the required high school curriculum. The certification form is located on the THECB's website at www.thecb.state.tx.us/UAP.

Adhering to Program Controlled Substance Restrictions [\(TAC, Section 22.230\)](#)

A student is not eligible to receive a TEXAS Grant award if convicted of a felony or an offense under the law in any jurisdiction involving a controlled substance as defined in [Chapter 481, Health and Safety Code](#) (Texas Controlled Substances Act). Institutions should consult with their internal legal counsel concerning individual student situations.

To comply with this requirement, institutions are required to collect a statement (electronic or paper) from each TEXAS grant recipient certifying that they have no such conviction. Institutions have the flexibility to determine the wording of the statement and the frequency with which it is collected. 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.

A person with a controlled substance conviction or offense can be considered for an award if they have **one** of the following:

- A certificate of discharge by the Texas Department of Criminal Justice or a correctional facility.
- Completed a period of probation ordered by a court, and at least two years have elapsed from the date of the receipt or completion.
- Been pardoned and had the record of the offense expunged from the person's record.

Discontinuation of Eligibility [\(TAC, Section 22.230\)](#)

Unless granted a hardship, a student's eligibility ends if any of the following maximums have been met:

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 via 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 via*: <ul style="list-style-type: none">• High school graduate• TEOG transfer• Military extension	5 years from the first semester awarded	6 years from the first semester awarded	150 SCH	150 SCH No Hardship Allowed

*Eligibility ends for all recipients once a baccalaureate degree has been obtained.

**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 that the student withdraws from. For transfer students, the transfer hours and hours for optional internship and cooperative education courses are included if they are accepted by the receiving institution towards the student's current program of study (See [TAC, Section 22.230](#)).

Hardship Provisions [\(TAC, Section 22.231\)](#)

A student who is ineligible for a TEXAS Grant award based on the general requirements may be deemed eligible under a hardship provision. There are limitations on which eligibility requirements can be granted a hardship. 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.

IMPORTANT NOTE: Students enrolled less than 6 SCH cannot be considered for a hardship and are not eligible for a TEXAS Grant award. While a hardship may be granted to allow an award in excess of 150 attempted semester credit hours (SCH), the total number of hours **paid for** with TEXAS Grant funds may not exceed 150 or 90 SCH.

Satisfactory Academic Progress (SAP) ([TAC, Section 22.229](#))

A student’s SAP eligibility is determined at the end of each academic year. At the end of the first academic year, a student must meet SAP requirements set by the institution to be considered eligible for their first RY award. At the end of the second academic year, and all years thereafter, a student must complete 24 SCH in the academic year and have a minimum 2.5 cumulative GPA.

Each recipient’s GPA and completed hours must be monitored to ensure compliance as outlined below. Student award history information is available to assist institutions with monitoring this requirement via the [SFAP Information Website](#).

IMPORTANT NOTE: A student who is below the SAP requirements at the end of the semester can appeal to have transfer courses included in the SAP calculation. In this case, all transfer courses must be included when determining program eligibility. If the resulting grade point average exceeds the program's academic progress requirement, an otherwise eligible student may receive an award in the following semester.

Academic Year	Satisfactory Academic Progress (SAP) Requirements	
End of 1st academic year	Institutional SAP Policy	
End of 2nd academic year or later	24 SCH in an academic year	2.5 cumulative GPA on a 4-point scale

AWARDING

If appropriations for the TEXAS Grant program are insufficient to allow awards to all eligible students, first priority will be given to students that are eligible for a RY award (See [TAC, Section 22.232](#)).

Allocations dedicated for IY students at GATIs and HRIs must first be used for students meeting the **Priority Model** requirements by the March 15 state priority deadline. Institutions have the flexibility to define what it means to meet the priority deadline. The IY students that do not meet the **Priority Model** but meet the state priority deadline should then be considered. If funds remain for IY awards after all state priority deadline eligible students have been awarded, the balance of allocated funds for IY students can go to all other eligible students (See [TAC, Section 22.226](#)).

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 [TAC, Section 22.233](#)).

IY awards can be made only to students whose EFCs are \$5,233 or less (9-month EFC). RY awards can be made to eligible students with EFCs higher than \$5,233 as long as the student has a calculated need. A TEXAS Grant award cannot exceed a student’s calculated financial need.

Institutions are encouraged to use the target award amounts to fund eligible renewal students, as well as fund newly eligible students. The maximum and targeted average award amounts can be found in [Appendix 1: 2016-17 Award Amount Summary](#).

Priority Award Model Requirements ([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** requirement in **at least two** of the following **four** areas:

Area	Requirement(s)
Advanced Academic Program	12 hours of college credit (dual credit or AP courses), complete the Recommended or Advanced High School Program or its equivalent, or complete the International Baccalaureate Program (IB)
TSI Readiness	Meet the Texas Success Initiatives (TSI) assessment thresholds or qualify for an exemption
Class Standing	Graduate in the top 1/3 of the HS graduating class or a grade point average of at least 3.0 on a 4-point scale
Advanced Math	Complete at least one math course beyond Algebra II or at least one advanced career and technical course, as determined by the Texas Education Agency (TEA)

Required Matching ([TAC, Section 22.234](#))

Institutions are required to cover the cost of tuition and required fees in excess of the TEXAS Grant award amount with non-loan aid. Matching non-loan aid may include any non-loan program funds awarded to the student from federal, state, institutional, or outside sources.

Over Awards ([TAC, Section 22.234](#))

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

Late Disbursements ([TAC, Section 22.235](#))

Funds that are disbursed after the end of a student's period of enrollment must either be used to pay the student's outstanding balance from his/her period of enrollment at the institution, or to make a payment against an outstanding loan received during that period of enrollment. Under no circumstances should funds be released directly to the student in this situation.

Proration ([TAC, Section 22.234](#))

Award amounts must be prorated if the student is in one of the following situations:

- Student is enrolled less than ¾-time, but at least ½-time, with an approved hardship:

Hardship Proration Schedule	Enrolled 6-8 Hours
	Maximum award for the semester divided by 12 and multiplied by the number of hours enrolled

- 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 = < 6 hours - 25% of the maximum award
Balance of eligible program hours while receiving grant funds (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, eligible institutions must submit a Funds Request Form (FRF). The FRF is available via the secure Coordinating Board Identification (CBID) portal on the [SFAP Information Website](#). Requests for funds may be made on an as-needed basis for current disbursements and must be applied to the student's account within 5 business days.

Returning Program Funds

Before any funds are returned to the THECB, a [Return of Funds Form](#) must first be submitted and approved. This form is available on the [SFAP Information Website](#). Funds that have been disbursed to an ineligible student must be returned to the THECB, unless the funds can be disbursed to an eligible student during the current fiscal year.

Authority to Transfer Funds ([TAC, Section 22.239](#))

Institutions participating in a combination of 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 in a given fiscal year. The transfer for funds must be encumbered by the institution by **February 20th**. A summary that outlines the authority to transfer process is available in [Appendix 2: Authority to Transfer Funds](#).

Appendices

Appendix 1: 2016-17 AWARD AMOUNT SUMMARY

TEXAS Grant

Institution Type	Award Max/Year	Award Max/Semester	TXG Only Target Award/Year	TXG Only Target Award/Semester
Public Universities, HRIs, Public State Colleges	\$8,722	\$4,361	\$5,000	\$2,500
Public Technical Institutions	\$4,572	\$2,286	\$2,500	\$1,250
Community Colleges	\$2,832	\$1,416	\$1,325	\$663

TEXAS Grant - EFC cap for Initial Year (IY) awards will be \$5,233 for General Academic Teaching Institutions (GATIs).

TEOG

Institution Type	Award Max/ year	Award Maximum Per Semester Based on Census Date Enrollment			
		Full-Time (12+ SCH's)	Three-Quarter Time (9-11 SCH's)	Half-Time (6-8 SCH's)	< Half-Time (1-5 SCH's)
Public State Colleges	\$5,486	\$2,743	\$2,057	\$1,372	\$0
Public Technical Institutions	\$4,756	\$2,378	\$1,784	\$1,189	\$0
Community Colleges	\$2,832	\$1,416	\$1,062	\$708	\$0

TEOG - EFC cap for Initial Year (IY) awards will be 5,233 for Community Colleges, State and Technical institutions.

TEG

Institution Type	Award Max/Year	Exceptional Need
Private Institutions	\$3,364	\$5,046

TEG - EFC's ≤ \$1,000 may receive up to the Exceptional Need award amount.

Top 10% Scholarship

Institution Type	Award Type	Award Max/Year
Public Institutions	Priority 1	\$2,000
	Priority 2	TBD

B-On-Time Loan

Institution Type	Award Max/Year	Award Max/Semester
Public Universities, HRIs, State Colleges and Private/Independent Institutions	\$8,722	\$4,361
Public Technical Colleges	\$4,572	\$2,286
Community Colleges	\$2,832	\$1,416

A 3% origination fee will be deducted from the loan proceeds.

Appendix 2: AUTHORITY TO TRANSFER FUNDS

Program		Rule
From	To	Authority to Transfer
TEXAS Grant TEOG TEG		Institutions may transfer up to 10% or 20,000 of the individual program annual allocation (whichever is less)
TCWS	TEXAS Grant TEOG TEG	
Funds can only be transferred from a grant to TCWS or vice versa, never from a grant to a grant.		

Appendix 3: ADDITIONAL RESOURCES

THECB CONTACT INFORMATION	
Contact THECB's Financial Aid Services Team	Austin Metro: (512) 427-6340 Outside Austin Metro: (800) 242-3062 / (844) 792-2640 <small>Available October 3, 2016</small>
FOR PROGRAM SPECIFIC QUESTIONS, EMAIL:	
Toward EXcellence, Access, & Success (TEXAS) Grant	TEXASGrant@thecb.state.tx.us
Texas Educational Opportunity Grant (TEOG)	TEOG@thecb.state.tx.us
Tuition Equalization Grant (TEG)	TEG@thecb.state.tx.us
Top 10 Percent Scholarship	TopTen@thecb.state.tx.us
Texas College Work-Study (TCWS)	TCWS@thecb.state.tx.us
Educational Aide Exemption (EAE)	EdAide@thecb.state.tx.us
General information on: exemption and waivers, state loan programs and other questions or topics	GrantInfo@thecb.state.tx.us
OTHER RESOURCES FOR INSTITUTIONS	
General program information for institutions	Student Financial Aid Programs Information Website
General loan information	HHloans
Texas Program Statutes	Texas Education Code
Texas Program Rules	Texas Administrative Code
Information concerning program processing, procedures, allocations, and other topics will be communicated to institutions through the GovDelivery system. In order to receive these communications, interested individuals must subscribe.	GovDelivery
AVAILABLE FORMS	
TEXAS Grant, TEOG, TEG, TCWS	Authority to Transfer
TEXAS Grant, TEOG, TEG, TCWS, Top 10% Scholarship, BOT, CAL, TASSP, EAE	Return of Funds Form
TEXAS Grant, TEOG, TEG	Funds Request Form Instructions
Top 10% Scholarship	Funds Request File Instructions
CALENDAR	
Institutional Calendar	