

State Financial Aid in Texas

New Aid Officer Workshop Basics 2024

Agenda

FAFSA VS. TASFA

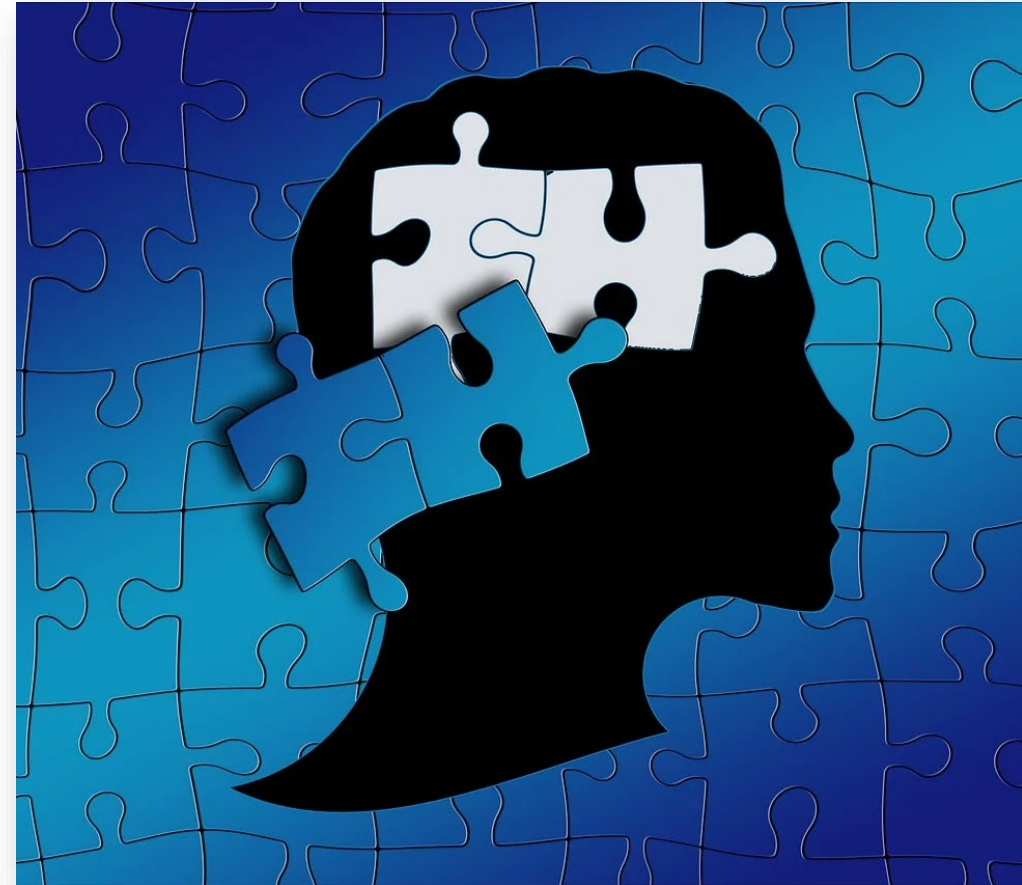
Over-Arching State
Eligibility
Provisions

State Grant
Eligibility
Requirements

Scholarship, Work-
Study, & Loan
Programs

Exemption &
Waiver Programs

Stay Connected



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 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.

Texas Higher Education COORDINATING BOARD

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Texas Application for State Financial Aid

THECB TASFA

The Texas Application for State Financial Aid (TASFA) is used by [participating institutions](#) of higher education in Texas to collect information to help determine a student's eligibility for state financial aid.

Who can submit a TASFA?

Students who are classified by the institution as a [Texas Resident](#) who cannot apply for federal financial aid, using the Free Application for Federal Student Aid (FAFSA), are encouraged to complete the TASFA. To see if you qualify for the FAFSA, please visit [www.studentaid.gov](#). Do not complete both the FAFSA and TASFA.

The 2024-2025 TASFA

The 2024-2025 Online TASFA is not currently available. To ensure students maximize state financial aid funding, we encourage students to complete the [paper TASFA](#). Please check back for updates.

Is the TASFA free?

Yes! Both the online and [paper TASFA](#) are free for students to complete (do not complete both). You will NEVER be required to pay money to complete the State's TASFA.

Is there a deadline to complete the TASFA?

Deadlines vary by institution. We recommend you contact the college you plan to attend to confirm final deadlines. Students should apply as soon as possible to maximize their state financial aid options since funding is limited.

Many institutions use the state priority deadline of January 15 for the upcoming award year. The priority deadline **is not a hard deadline** so applicants can still submit a TASFA after this date. Applications that are submitted before the deadline will receive priority consideration for available funding.

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

State Financial Aid Application Priority Deadline

A state priority deadline of **January 15** was established to prioritize the limited funding available to eligible students and provide consistency for Texas students at Texas institutions.

Due to the delayed release of the FAFSA and TASFA, the priority deadline for the 2024-25 application year has been extended to
April 15, 2024.



Calculating Financial Need

- Much of State Financial aid has financial need as a requirement
- Financial need is calculated based off federal methodologies
- Federal methodologies are now using the Student Aid Index (SAI)
- Institutions will use the FAFSA or the TASFA submitted to calculate SAI
- Financial need is The Cost of Attendance (COA) minus the SAI
- State financial aid is limited and competitive in nature, so many programs have a priority awarding process incorporating financial need.



Selective Service Requirement

Any of the following can be used to meet the statutory statement requirement:

- THECB Selective Service Statement of Registration Status ([English Statement](#) or [Spanish Statement](#))
- Printout from [SSS.gov](#) website
- Institutional Student Information Record (ISIR) if status is available*
- THECB Selective Service Statement of Registration Status embedded in the Texas Application for State Financial Aid (TASFA)

*As of FY 2023-24, registration status is no longer reported on the ISIR. Institutions can use any prior year ISIR that confirms registration to meet the statutory requirement for a student's status.

The form is titled "SELECTIVE SERVICE STATEMENT OF REGISTRATION STATUS". It includes a yellow header with text: "In accordance with Texas Education Code, Section 51.9095, male students must file a Selective Service Statement of Registration Status with their institution or other entity granting financial assistance. For more information about the Selective Service System, visit [sss.gov](#)." Below this, it says "Please mark **one** option below:" and lists four options with checkboxes: 1. "I was born female and not required to register." 2. "I was born male and am under the age of 18 and not currently required to register." 3. "I was born male and am REGISTERED with the Selective Service." 4. "I was born male and over the age of 18. I am not registered with Selective Service and I am not exempt from registration with Selective Service." To the right of these options is a box for "I was born male and am EXEMPT from registration because: (please briefly explain why you are exempt in the box below.)". At the bottom, there is a line for "I, _____, hereby certify that the Selective Service status statement provided above is true and accurate." followed by fields for "Student ID:", "Signature:", and "Date:". The footer contains "Complete and return to the Financial Aid Office at your institution of higher education." and "As of 09/28/2023".

Institutions are **not** required to collect “proof” of registration or exemption from students or to verify the accuracy of the statement against external databases or other resources if conflicting information does not exist. See [Updated Guidance on Statutory Requirements that Impact Financial Aid Memo](#)).

State Grant Programs



TEXAS EDUCATIONAL
OPPORTUNITY GRANT
(TEOG)



TOWARD EXCELLENCE,
ACCESS, AND SUCCESS
(TEXAS) GRANT



TUITION EQUALIZATION
GRANT (TEG)

Texas Educational Opportunity Grant (TEOG)

TEOG Initial Year Eligibility

To receive an initial TEOG award, a student must:

- be classified by the institution as a Texas resident
- be registered with Selective Service, or be exempt
- have financial need
- have not been convicted of any felony or any offense involving a controlled substance
- be enrolled **at least half-time** as an undergraduate student with no more than **30 SCH**:
 - **Includes** all hours earned that are being accepted by the institution
 - **Excludes** dual enrollment credits & credits earned by examination

Available at:

- Public Community Colleges
- Public State Colleges
- Texas State Technical Institutes

TEOG Program Guidelines:

<https://reportcenter.highered.texas.gov/agency-publication/guidelines-manuals/texas-educational-opportunity-grant-fy-2024-guidelines/>

TEOG Renewal Eligibility

End of Initial Year

- Meet Institutional SAP

Renewal Years

- 2.5 GPA
- 75% Completion Rate

End of Eligibility

- Earn an Associate or Bachelor's Degree
- Attempt 75 SCH



TEOG 2024-25 Award Maximums

Institution Type	Semester Max	Year Max (Fall, Spring, and Summer)
Public State College	\$1,730	\$5,190
Public Technical Institute	\$4,285	\$12,855
Public Community College	\$2,886	\$8,658

Students can receive an award for Fall, Spring, and Summer terms.

Toward, EXcellence, Access, and Success (TEXAS) Grant

TEXAS Grant Initial Year Eligibility

To receive an initial TEXAS Grant award, a student must:

- be classified by the institution as a Texas resident
- be registered with Selective Service, or be exempt
- have financial need
- have not been convicted of any felony or any offense involving a controlled substance
- be enrolled **at least three-quarter time** as an undergraduate student with no more than 30 SCH:
 - **Includes** all hours earned that are being accepted by the institution
 - **Excludes** dual enrollment credits & credits earned by examination

Available at:

- Public Universities
- Health-Related Institutions (HRIs)

TEXAS Grant Program Guidelines:

<https://reportcenter.highered.texas.gov/agency-publication/guidelines-manuals/texas-grant-fy-2024-guidelines/>

TEXAS Grant Initial Award Pathways

High School Graduates

Enroll within 16 months of graduating from an accredited public or private high school in Texas.

Associate Degree Transfer

Enroll in an eligible institution within 12 months of earning an associate degree in Texas.

TEOG Transfer

TEOG recipient transferring with completion of at least 24 SCHs and a minimum 2.5 GPA.

Military Service

Enroll within 12 months of receiving an honorable discharge, general discharge under honorable conditions, or honorable separation or release from active duty, documented on the DD214.

TEXAS Grant Priority Award Consideration

To receive priority consideration for an initial award, an eligible student **must** meet:

- At least **one** High School Graduation Requirement in **at least two** of the Priority Areas.

Priority Areas	Requirements
ADVANCED ACADEMIC PROGRAM	<ul style="list-style-type: none">• 12 hours of college credit (dual credit or AP courses)• Complete the equivalent of the Recommended or Advanced High School Program• 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)

TEXAS Grant Renewal Eligibility

End of Initial Year

- Meet Institutional SAP

Renewal Years

- 2.5 GPA
- 24 SCH

End of Eligibility

- Earn a Bachelor's Degree
- Attempt 150 SCH



TEXAS Grant 2024-25 Award Maximums

Institution Type	Semester Max	Target Semester Max	Year Max (Fall, Spring, and Summer)	Target Year Max (Fall, Spring, Summer)
Public universities and health related institutions	\$5,394	\$2,500	\$16,182	\$7,500

Students can receive an award for Fall, Spring, and Summer terms.

Tuition Equalization Grant (TEG)

TEG Initial Year Eligibility

To receive a first TEG 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 three-quarter time**
- be attempting their first associate, baccalaureate, master's, or doctoral degree
- not be concurrently receiving an athletic scholarship
- not be enrolled in a degree plan intended to lead to religious ministry

Available at:

- Private or Independent Institutions (non-profit)

TEG Program Guidelines:

<https://reportcenter.highered.texas.gov/agency-publication/guidelines-manuals/tuition-equalization-grant-fy-2024-guidelines/>

TEG

Renewal Eligibility

End of Initial Year

- Meet Institutional SAP

Renewal Years

- 2.5 GPA
- 75% Completion Rate
- UNDERGRADUATE – Complete 24 SCH
- GRADUATE – Complete 18 SCH


End of Eligibility

- UNDERGRADUATE – 10 consecutive semesters
- GRADUATE – No limit



TEG 2023-24 Award Maximums

Undergraduate/Graduate students	\$3,873
Undergraduate students with exceptional need	\$5,810

 **Updated ALERT: Update to Exceptional Need ([TAC, Section 22.24\(b\)](#))**

The following rule change was proposed after consensus during negotiated rulemaking activities in November 2022 and approval by the Board in April 2023.

[TAC, Section 22.24\(b\)](#): The term "exceptional need" was changed to provide institutions with greater flexibility in supporting economically disadvantaged students through funds from the TEG program. The **previous** rule for "exceptional need" was for an undergraduate student that had an expected family contribution (EFC) less than or equal to \$1,000.

Beginning 2023-24, exceptional need will apply to undergraduate students that have an EFC less than or equal to 50% of the federal Pell Grant eligibility cap that aligns with the year the institution is packaging (i.e., institutions will use 50% of the 2023-24 Pell grant cap to determine which students can receive a TEG award in 2023-24).

Exceptional Need

Update to Exceptional Need (TAC, Section 22.24(b))

The following rule change was proposed after consensus during negotiated rulemaking activities in November 2022 and approval by the Board in April 2023. TAC, Section 22.24(b):

The term "exceptional need" was changed to undergraduate students that have an EFC less than or equal to 50% of the federal Pell Grant eligibility cap that aligns with the year the institution is packaging.

For example: Institutions will use 50% of the 2024-25 Pell grant cap (\$7,395) to determine which students can receive an exceptional need TEG award.

- 50% of the Pell cap for 2024-25 of \$7,395 is \$3,697.50
- \$3,697.50 is the SAI cap for Exceptional Need.
- Any student with a Student Aid Index under or equal to \$3,697.50 would qualify for exceptional need if otherwise eligible for TEG.

Tuition Differential

- Tuition differential is defined as the difference between the tuition paid at a private or independent institution and the tuition the student would have to pay to attend a comparable public institution in Texas.
- Fees are not included in this calculation.
- To calculate the tuition differential, the institution must first identify its designated Southern Association of Colleges and Schools (SACS) level.
- SACS identifies institutions by the highest levels of degrees they offer.
- The THECB publishes average resident undergraduate and graduate tuition rates per semester credit hour for public institutions at various SACS levels each year in the TEG Program Guidelines.

Tuition Differential Calculation

Institution Hourly Tuition Rate – SACS Average Hourly Tuition = Difference x Total Hours Enrolled = Tuition Differential

$$\mathbf{\$797 - \$201 = 596 \times 24 = \$14,304}$$

Example 1:

COA = 30,000

SAI = 500

Financial Need = \$29,500

Enrolled Fall/Spring = 12 credits (24 total)

Tuition Diff = \$14,304

Award = \$5,810

Example 2:

COA = 30,000

SAI = 28,000

Financial Need = \$2,000

Enrolled Fall/Spring = 12 credits (24 total)

Tuition Diff = \$14,304

Award = \$2,000

State Scholarship, Work-Study and Loan Programs



SCHOLARSHIP
PROGRAMS



WORK-STUDY
PROGRAMS



LOAN PROGRAMS

Texas First Scholarship

Texas First Scholarship Overview

The Texas First Program is designed to keep Texas' best and brightest on a direct track to a postsecondary pathway here in our great state. Texas' top students can accelerate their path to college and earn up to a year in scholarship dollars to attend select Texas institutions.



Texas First Program Webpage: <https://www.highered.texas.gov/our-work/empowering-our-students/the-texas-first-program/>

Texas First Scholarship Eligibility

To qualify for a state credit, 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*.

Available at:

- Public Universities
- Public Community Colleges
- Public State Colleges
- Texas State Technical Institutes

Texas Armed Services Scholarship Program (TASSP)

TASSP Eligibility

To receive a TASSP award, a student must:

- be appointed for the scholarship by the governor, lieutenant governor, state senator, or state representative
- be registered with Selective Service, or be exempt
- be enrolled and in good standing in a Reserve Officers' Training Corps (ROTC), or another undergraduate officer commissioning program, as certified by the institution
- enter into a written agreement with the THECB

Available at:

Public or Private or
Independent Institutions
with an ROTC program in
Texas.

TASSP Program Guidelines:

<https://reportcenter.highered.texas.gov/agency-publication/guidelines-manuals/texas-armed-services-scholarship-program-fy-2024-guidelines/>

TASSP 2023-24 Annual Award Maximum

Institution Type	Award Maximum
Public or Private Institutions of Higher Education	Up to \$15,000

Note: If program requirements are not met, the TASSP scholarship is converted to a loan and will carry the applicable College Access Loan (CAL) interest rate in the year converted.

Work-Study Programs

Work-Study Eligibility

To receive a Work-Study 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 half-time**
- not be a concurrent recipient of an athletic scholarship
- not be enrolled in a seminary or other program leading to ordination or licensure to preach for a religious sect or to be a member of a religious order;
- If participating in the Mentorship Program, receive appropriate training and supervision

Available at:

- Public and Private Universities
- Health-Related Institutions
- Public Community Colleges
- Texas State Technical Institutes

Work-Study Program Guidelines:

<https://reportcenter.highered.texas.gov/agency-publication/guidelines-manuals/work-study-program-guidelines/>

College Access Loan (CAL) Program

CAL Program

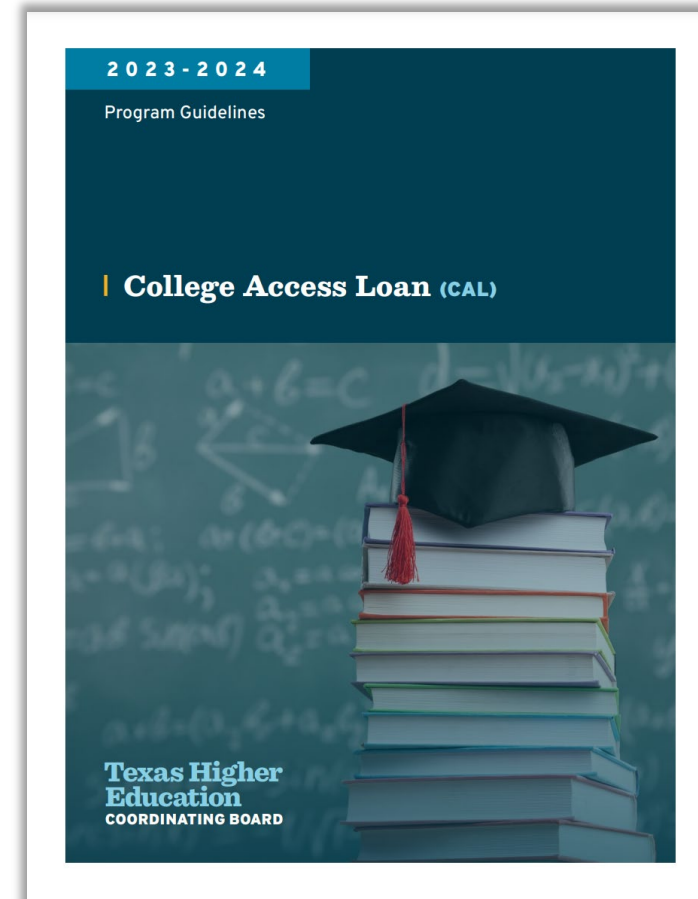
The CAL program provides alternative loans to Texas students at public and private institutions.

The current fixed interest rate is 5.85%.

Eligibility requirements:

- be classified by the institution as a Texas resident
- be registered with Selective Service, or be exempt
- be enrolled at least half-time
- Receive a favorable credit evaluation*
- meet institutional satisfactory academic progress (SAP) requirements
- cannot exceed manageable student loan debt as determined by the Texas Higher Education Coordinating Board

*Borrower or co-borrower must have a minimum Experian VantageScore of 650 to receive credit approval.

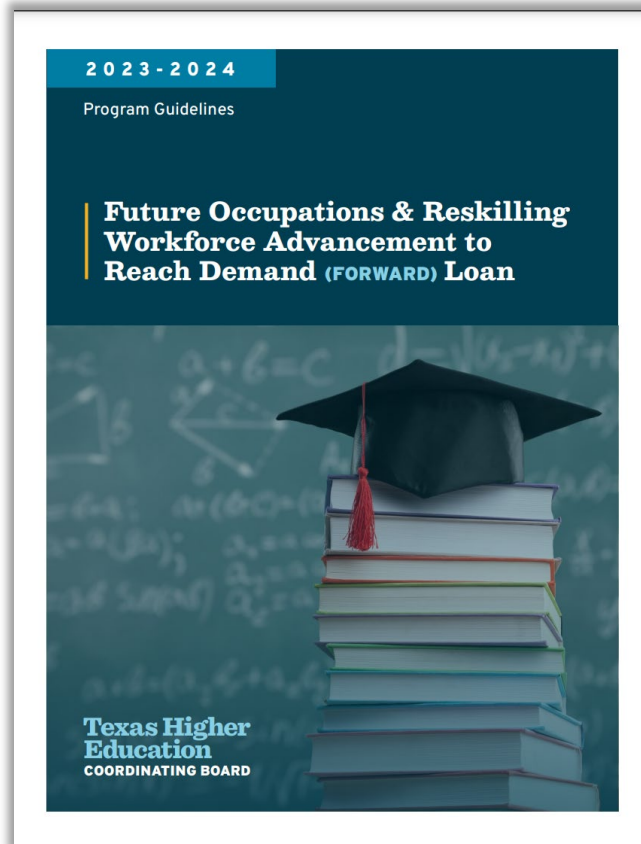


CAL Program Guidelines:

<https://reportcenter.highered.texas.gov/agency-publication/guidelines-manuals/college-access-loan-fy-2024-guidelines/>

Future Occupations & Reskilling Workforce Advancement to Reach Demand (FORWARD) Loan Program

FORWARD Program



FORWARD Program Guidelines:

<https://reportcenter.highered.texas.gov/agency-publication/guidelines-manuals/forward-loan-fy-2024-guidelines/>

The FORWARD Loan Program is a low-interest loan designed for students enrolled in programs aligned with high-value credentials and high-demand occupations.

The current fixed interest rate is 3.85%.

Eligibility requirements:

- be classified by the institution as a Texas resident
- be registered with Selective Service, or be exempt
- meet the satisfactory academic progress requirements set by the institution
- receive a favorable credit evaluation or provide a cosigner who has good credit standing
- not exceed the manageable loan debt calculated by the THECB
- be enrolled in a High-Demand Credential program that the student will be able to complete in two years or less;

Additional enrollment requirements:

- If enrolled in a **degree program**, must have completed at least 50% of the required coursework prior to receiving a loan through the Program
- If enrolled in a **non-degree program**, the program's duration must be less than two years
- If enrolled in master's degree coursework, the master's degree must be part of a **combined baccalaureate-master's** program approved by the institution of higher education

*Borrower or co-borrower must have a minimum Experian VantageScore of 650 to receive credit approval.

Manageable Debt Calculation (MDC)

Explanation

Application Checklist

Application status for _____ in the amount _____ ✖
of \$9,500 (CLUID: 8120890003W00N043)

Status: Incomplete

Task	Completion Date	Responsibility
✓ Borrower Application Completed ?	2/12/2023	Borrower
✓ Borrower Application Signed ?	2/12/2023	Borrower
✓ Private Education Loan Applicant Self-Certification (BCF) Signed ?	2/12/2023	Borrower
✓ Cosigner Application Completed ?	2/12/2023	Cosigner
✓ Cosigner Application Signed ?	2/12/2023	Cosigner
✓ Credit Approved ?	2/12/2023	Lender
— Lender Approval Completed ?		Lender
✓ School Certification Completed ?	2/28/2023	School
— Loan Guaranteed ?		Lender
— Private Education Loan Approval Disclosure (LAD) Sent ?		Lender
— Private Education Loan Approval Disclosure (LAD) Accepted ?		Borrower
— Private Education Loan Final Approval (LCD) form Sent ?		Lender
— Required Right to Cancel Waiting Period ?		Borrower
— Ready to Disburse ?		Lender

THECB completes the manageable debt calculation to determine final eligibility. Depending on the calculation, the loan could be approved, reduced, or canceled by the THECB.

The Calculation

Amount approved by THECB will depend on:

- ✓ Borrower's Program of Study
- ✓ Current Educational Debt



Current Education Debt

Included

- ✓ Education accounts that are open with an active balance on the tradeline (Experian)
- ✓ Private and federal loans
- ✓ New loans with a Loan Consummation Disclosure (LCD) generated
- ✓ Pending disbursements

Not Included

- ✓ Paid and Closed accounts

The Cosigner's debt is not included in the calculation

Possible Outcomes after MDC Review



FULL LOAN AMOUNT
APPROVED



REDUCED LOAN AMOUNT
APPROVED



LOAN CANCELLED

Manageable Debt Formulas

1	1	Loan Program Year	Year 1	Manageable Debt Calculation (MDC) Form			
2	2	Details: APTU		Date 2/16/23			

19	Cost of Attendance	APUS: Cost Attend
20	Less Other Estimated Financial Aid	APUS: Est Fin Aid
21	Difference	
22		

23	THECB Review (Credit Review, Laserfiche)			
24	Current Manageable Debt, Principal Balance of Student Loans			
25	Debt 1	\$1,118	Debt 7	\$10,000
26	Debt 2	\$3,500	Debt 8	
27	Debt 3	\$3,595	Debt 9	
28	Debt 4	\$2,000	Debt 10	
29	Debt 5	\$2,750	Debt 11	
30	Debt 6	\$10,000	Debt 12	
31				
32	Current Manageable Debt, Total			\$32,963
33				

35	Maximum Manageable Debt	\$79,067	
36	Less Current Manageable Debt	\$32,963	APU2: DEBT OTH
37	Allowable Manageable Debt	\$46,104	APU2: DEBT TTL
38	FORWARD Loan Amount Certified	\$10,000	

- ✓ Maximum Manageable Debt is determined by the Program Of Study

$$COA - EFA = \text{Unmet Cost}$$

- ✓ Unmet Cost must be equal to or less than the requested amount/certified amount
- ✓ Current Manageable Debt = All Open Educational Loans
- ✓ Maximum Manageable Debt - Current Manageable Debt = Allowable Manageable Debt
- ✓ Allowable Manageable Debt is the deciding factor for loan approval

Full Loan Amount Approval

24	Current Manageable Debt, Principal Balance of Student Loans	
25	\$1,118	\$10,000
26	\$3,500	
27	\$3,595	
28	\$2,000	
29	\$2,750	
30	\$10,000	
31		
32	Current Manageable Debt, Total	\$32,963
33		
34	Pre-Manageable Debt	
35	Maximum Manageable Debt	\$79,067
36	Less Current Manageable Debt	\$32,963 <i>APU2: DEBT OTH</i>
37	Allowable Manageable Debt	\$46,104 <i>APU2: DEBT TTL</i>
38	FORWARD Loan Amount Certified	\$10,000
39	Eligible FORWARD Loan Amount	\$10,000
40		
41	THECB Review	
42	Approved FORWARD Loan Amount	\$10,000
43		
44	Post-Manageable Debt	\$42,963
45		
46	Future FORWARD Loan Eligibility	\$36,104
47		
48	Comments	
	Approved FORWARD Loan Amount = Eligible FORWARD Loan Amount	

Manageable Debt Calculation (MDC) Fo

- ✓ Borrowers Current Manageable Debt is \$32,963
- ✓ Borrowers Allowable Debt is \$46,104 and the certified requested amount was \$10,000
- ✓ THECB would approve the Full Loan Amount of \$10,000

Full Loan Amount Approved

Loan status: the amount of \$10,000 ✖

(CLUID: _____)

Status: Incomplete

Task	Completion Date	Responsibility
✓ Borrower Application Completed ?	8/21/2023	Borrower
✓ Borrower Application Signed ?	8/21/2023	Borrower
✓ Private Education Loan Applicant Self-Certification (BCF) Signed ?	8/21/2023	Borrower
✓ Credit Approved ?	8/21/2023	Lender
✓ Lender Approval Completed ?	9/7/2023	Lender
✓ School Certification Completed ?	9/6/2023	School
✓ Loan Guaranteed ?	9/7/2023	Lender
✓ Private Education Loan Approval Disclosure (LAD) Sent ?	9/11/2023	Lender
— Private Education Loan Approval Disclosure (LAD) Accepted ?		Borrower
— Private Education Loan Final Approval (LCD) form Sent ?		Lender
— Required Right to Cancel Waiting Period ?		Borrower
— Ready to Disburse ?		Lender

HelmNet Task List

- ✓ Lender Approval Complete
- ✓ Loan Guaranteed
- ✓ Private Education Loan Approval Disclosure (LAD) Sent

Reduced Loan Amount Approval

24	Current Manageable Debt, Principal Balance of Student Loans									
25	\$1,118	\$10,000								
26	\$3,500	\$20,000								
27	\$3,595	\$10,000								
28	\$2,000	\$10,000								
29	\$2,750									
30	\$10,000									
31										
32	Current Manageable Debt, Total		\$72,963							
33										
34	Pre-Manageable Debt									
35	Maximum Manageable Debt		\$79,067							
36	Less Current Manageable Debt		\$72,963	APU2: DEBT OTH						
37	Allowable Manageable Debt		\$6,104	APU2: DEBT TTL						
38	FORWARD Loan Amount Certified		\$10,000							
39	Eligible FORWARD Loan Amount		\$6,104							
40										
41	THECB Review									
42	Approved FORWARD Loan Amount		\$6,104							
43										
44	Post-Manageable Debt		\$79,067							
45										
46	Future FORWARD Loan Eligibility		\$0							
47										
48	Comments									
	Approved FORWARD Loan Amount = Less Than School Certified Amount based to total current manageable debt									

- ✓ Borrowers Current Manageable Debt Total increased to \$72,963 which reduced the Allowable Manageable Debt to \$6,104
- ✓ THECB will reduce the certified loan amount from \$10,000 to \$6,104 and Approve

Reduced Loan Amount Approved

Loan status for _____ amount of **\$6,104** ✖

(CLUID: _____)

Status: Incomplete

Task	Completion Date	Responsibility
✓ Borrower Application Completed ?	8/9/2023	Borrower
✓ Borrower Application Signed ?	8/9/2023	Borrower
✓ Private Education Loan Applicant Self-Certification (BCF) Signed ?	8/9/2023	Borrower
✓ Cosigner Application Completed ?	8/9/2023	Cosigner
✓ Cosigner Application Signed ?	8/9/2023	Cosigner
✓ Credit Approved ?	8/9/2023	Lender
✓ Lender Approval Completed ?	8/31/2023	Lender
✓ School Certification Completed ?	8/25/2023	School
✓ Loan Guaranteed ?	8/31/2023	Lender
✓ Private Education Loan Approval Disclosure (LAD) Sent ?	8/31/2023	Lender
✓ Private Education Loan Approval Disclosure (LAD) Accepted ?	9/9/2023	Borrower
✓ Private Education Loan Final Approval (LCD) form Sent ?	9/11/2023	Lender
— Required Right to Cancel Waiting Period (9/11/2023 - 9/20/2023) ?		Borrower
— Ready to Disburse on 9/26/2023 ?		Lender

HelmNet Task List

- ✓ Lender Approval Complete
- ✓ Loan Guaranteed
- ✓ Private Education Loan Approval Disclosure (LAD) Sent

Amount of loan was reduced by THECB due to MDC

Reduced Loan Amount Approved

Texas Higher Education Coordinating Board

STUDENT FINANCIAL AID PROGRAMS

PO Box 12788, Austin, TX 78711-2788
800-242-3062 Fax: 512-427-6423
www.hhloans.com

September 7, 2023

Re: College Access Loan

Student Name: Mickey Mouse
Application # 8120890003W00N044
Institution: THECB University
Program of Study: Nursing Education

Our office recently received a certification for the College Access Loan (CAL) for student above. Changes have been made to the certified amount because the students' debt level for the chosen program of study exceeds the manageable debt level calculation.

One of the goals for the CAL program is for students to graduate with manageable student loan debt, meaning their monthly loan payment is no more than 10% of their gross earnings and they are able to pay off their student loan debt within 10 years. Additional information regarding eligibility for the CAL program is available under [Texas Administration Code, Chapter 22, Subchapter C](#).

You may view the changes online at [HelmNet \(HHLOANS\) Login](#).

For questions, contact Financial Aid Services at 844-792-2640 or through [CONTACT US](#) (select "Financial Aid Question" under Contact Reason).

Student Financial Aid Programs

For online account and payment information, please visit [www.hhloans.com](#)

Our office recently received a certification for the College Access Loan (CAL) for student above. Changes have been made to the certified amount because the students' debt level for the chosen program of study exceeds the manageable debt level calculation.

One of the goals for the CAL program is for students to graduate with manageable student loan debt, meaning their monthly loan payment is no more than 10% of their gross earnings and they are able to pay off their student loan debt within 10 years. Additional information regarding eligibility for the CAL program is available under [Texas Administration Code, Chapter 22, Subchapter C](#).

You may view the changes online at [HelmNet \(HHLOANS\) Login](#).

Cancelled Loan Amount

24	Current Manageable Debt, Principal Balance of Student Loans										
25	\$1,118	\$10,000									
26	\$3,500	\$20,000									
27	\$3,595	\$10,000									
28	\$2,000	\$8,500									
29	\$2,750	\$7,550									
30	\$10,000										
31											
32	Current Manageable Debt, Total		\$79,013								
33											
34	Pre-Manageable Debt										
35	Maximum Manageable Debt		\$79,067								
36	Less Current Manageable Debt		\$79,013 APU2: DEBT OTH								
37	Allowable Manageable Debt		\$54 APU2: DEBT TTL								
38	FORWARD Loan Amount Certified		\$10,000								
39	Eligible FORWARD Loan Amount		\$54								
40											
41	THECB Review										
42	Approved FORWARD Loan Amount		\$0								
43											
44	Post-Manageable Debt		\$79,013								
45											
46	Future FORWARD Loan Eligibility		\$54								
47											
48	Comments										
DENIED = Allowable Manageable Debt/Eligible Loan amount is less than \$100.00											

- ✓ Borrowers Current Manageable Debt Total increased to \$79,013 which reduced the Allowable Manageable Debt to \$54
- ✓ THECB will cancel this loan because the Allowable Manageable Debt is less than \$100
- ✓ THECB cannot issue a loan for less than \$100

Loan Cancelled by THECB

Application status for _____ in the amount _____ ✘

of **\$10,000**

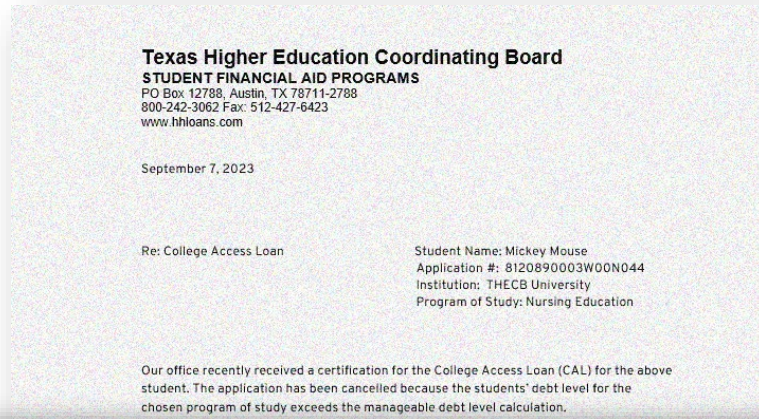
Status: Canceled

Task	Completion Date	Responsibility
✔ Borrower Application Completed ?	2/12/2023	Borrower
✔ Borrower Application Signed ?	2/12/2023	Borrower
✔ Private Education Loan Applicant Self-Certification (BCF) Signed ?	2/12/2023	Borrower
✔ Cosigner Application Completed ?	2/12/2023	Cosigner
✔ Cosigner Application Signed ?	2/12/2023	Cosigner
✔ Credit Approved ?	2/12/2023	Lender
✘ Lender Approval Completed ?		Lender
✘ School Certification Completed ?		School
✘ Loan Guaranteed ?		Lender
✘ Private Education Loan Approval Disclosure (LAD) Sent ?		Lender
✘ Private Education Loan Approval Disclosure (LAD) Accepted ?		Borrower
✘ Private Education Loan Final Approval (LCD) form Sent ?		Lender
✘ Required Right to Cancel Waiting Period ?		Borrower
✘ Ready to Disburse ?		Lender

After THECB completes the Manageable Debt Calculation:

- ✔ HelmNet Status will show as Canceled
- ✔ All remaining tasks will contain a red "X"

Loan Cancelled by THECB



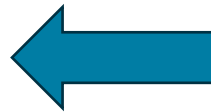
Our office recently received a certification for the College Access Loan (CAL) for the above student. The application has been cancelled because the students' debt level for the chosen program of study exceeds the manageable debt level calculation.

One of the goals for the CAL program is for students to graduate with manageable student loan debt, meaning their monthly loan payment is no more than 10% of their gross earnings and they are able to pay off their student loan debt within 10 years. Additional information regarding eligibility for the CAL program is available under [Texas Administration Code, Chapter 22, Subchapter C.](#)

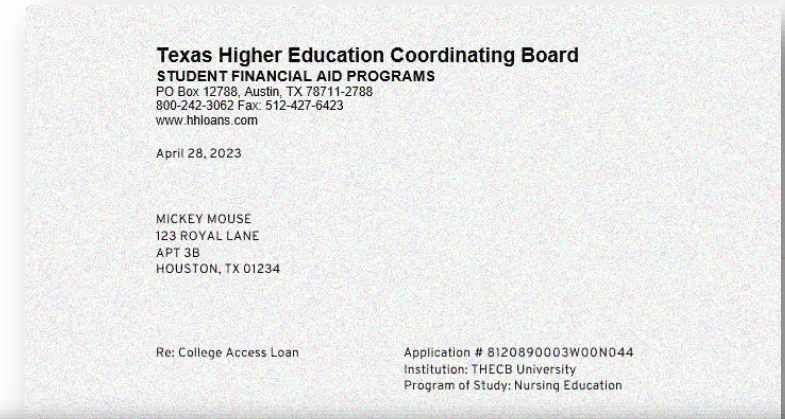
You may view the changes online at [HelmNet \(HHLOANS\) Login.](#)

For online account and payment information, please visit [www.hhloans.com](#)

Letter emailed to the
INSTITUTION'S
Financial Aid Director
and Shared Mailed box
requested on the User Access
form



Letter is mailed to the **STUDENT**



We regret to inform you that we are unable to continue processing your request for the College Access Loan (CAL).

You are not eligible to receive funding under the CAL program because the debt level you will accrue while enrolled in your chosen program of study exceeds the manageable debt level calculation. One of the goals and eligibility requirements of the CAL program is for students to graduate with manageable student loan debt, meaning their monthly loan payment is no more than 10% of their gross earnings and they are able to pay off their student loan debt within 10 years. Additional information regarding eligibility for the CAL program is available under Texas Education Code, Chapter 52 or [Texas Administrative Code, Chapter 22, Subchapter C.](#)

For additional assistance, please contact Customer Support Services at 800-242-3062, Monday through Friday, 8:00 a.m. to 5:00 p.m., CST.

Loan Canceled by Student or School

Application status for ANGELO STATE UNIVERSITY in the amount of \$4,055 (CLUID: 8120890003WH5B01E) ✖

Status: Canceled by the School on 8/31/2023

Task	Completion Date	Responsibility
✔ Borrower Application Completed ?	8/11/2023	Borrower
✔ Borrower Application Signed ?	8/11/2023	Borrower
✔ Private Education Loan Applicant Self-Certification (BCF) Signed ?	8/11/2023	Borrower
✔ Cosigner Application Completed ?	8/11/2023	Cosigner
✔ Cosigner Application Signed ?	8/11/2023	Cosigner
✔ Credit Approved ?	8/11/2023	Lender
✖ Lender Approval Completed ?		Lender
✖ School Certification Completed ?		School
✖ Loan Guaranteed ?		Lender
✖ Private Education Loan Approval Disclosure (LAD) Sent ?		Lender
✖ Private Education Loan Approval Disclosure (LAD) Accepted ?		Borrower
✖ Private Education Loan Final Approval (LCD) form Sent ?		Lender
✖ Required Right to Cancel Waiting Period ?		Borrower
✖ Ready to Disburse ?		Lender


No communication is sent when a school or student cancels a loan.

Exemptions and Waivers

Exemption and Waiver Programs

More than **50** exemption and waiver programs may be available to Texas resident and nonresident students attending **public** institutions.

<http://reportcenter.highered.texas.gov/agency-publication/miscellaneous/grant-special-programs-exemptions-and-waivers-summary-list/>



Exemptions and Waivers Summary

Texas provides various programs that exempt or waive tuition, fees, and other expenses related to attending public colleges and universities. All exemption and waiver programs are authorized by the Texas Legislature and target specific populations. While many programs are **mandated** for all public institutions to implement, some programs are **optional**, and implementation is left to the discretion of the governing board at the institution.

- ❖ **Exemptions** allow special groups of Texas residents or nonresidents to enroll and pay a reduced amount of tuition or fees.
- ❖ **Waivers** allow special groups of nonresidents to enroll and pay the Texas resident tuition or fee rate.
 - ➔ All exemption and waiver programs (mandatory/optional) apply only to courses for which an institution can receive **formula funding**.
 - **Formula Funding:** is defined as the method used to allocate appropriated sources of funds among institutions of higher education. Formula-funded courses are those that do not depend solely on student tuition and fees to cover their costs.
 - ➔ All exemption and waiver programs require a student to meet certain eligibility criteria. In addition to meeting the program criteria, a student's continued eligibility may be impacted by [Texas Education Code \(TEC\) Section 54.2001](#). This section applies an excess hours' limitation for undergraduate students and Grade Point Average (GPA) requirement for both undergraduate and graduate students for exemption and waiver programs authorized under TEC, Section 54, Subchapter D.

The chart below identifies which programs are **Mandatory** or **Optional** and are impacted by TEC, Section 54.2001.

Table Legend

M = Mandatory	Exempt = Program falls under Subchapter D of Chapter 54 but is listed as <i>exempt</i> in 54.2001(g).
*M = Mandatory if funding appropriated; otherwise not available	Impacted = Program falls under Subchapter D of Chapter 54 and is <i>impacted</i> by 54.2001.
O = Optional	Excluded = Program does NOT fall under Subchapter D of Chapter 54 and is therefore <i>excluded</i> from 54.2001.
*O = Optional if no funding available; otherwise Mandatory	

M = Mandatory or O = Optional	E = Exemption or W = Waiver	Program Name	Statute	TEC, Section 54.2001	THECB Rules
O	E	100 Mile Waiver	TEC 54.0601	Excluded	19 TAC, Section 21.2264
M	W	Academic Common Market Waiver	TEC 54.233	Exempt	N/A
O	E	Ad Valorem	TEC 130.0032	Excluded	N/A
M	E	Adopted	TEC 54.367	Exempt	N/A
M	W	Biomedical MD/PhD	TEC 54.214	Exempt	N/A
M	W	Border County/Parish	TEC 54.231(g)	Exempt	N/A

Exemptions and Waivers Summary
As of March 30, 2021
1

Questions?

Stay Connected



THECB WEBSITES



SFAP LISTSERV



CONTACT US

Student Financial Aid Programs

The Office of Student Financial Aid Programs (SFAP) supports institutions of higher education with the administration of state financial aid programs. We also contribute to expanding financial aid knowledge through assistance in customer service, communication, and training for Texas students, borrowers, and institutions of higher education.

Latest News

Alerts

- A revised 2023-24 FAFSA File Layout has been released. Please see the [news item from May 4, 2023](#).
- The Financial Aid Database (FAD) Cycle reporting for 2022-23 (FY 2023) has been cancelled. For more information, please see the [news item from 8, 2022](#), and the revised [FAQ: Consolidation Report Details](#).
- Announcing a new low-interest loan option for Texas students, the Future Occupations and Reskilling Workforce Advancement to Reach Demand (FORWARD) Loan Program. Please see the [application link](#), [FAQ](#), and [program availability and the application link](#).

Deadlines

- The deadline to submit Good Neighbor Program recommendation forms was **March 15, 2023**. No more nominations can be submitted for FY 2024. Please see the [FAQs from Jan. 26, 2023](#).
- Institutions requesting to transfer funds between state grant and work-study programs must submit a request by **July 1, 2023** using the [request form](#). Please see the [news item from June 6, 2023](#).

Reminders

- 2023-24 FAFSA

Texas Higher Education Coordinating Board Student Loans

Stay Connected

Access the Financial Aid

Programs

Find information on various



- View My Account
- Apply Online
- Forms - Loan and Scholarship Programs
- Other Forms of Financial Aid
- Loan Repayment Programs
- Payment Options
- Contact Information
- COVID-19 Information

COLLEGE FOR ALL TEXANS

Search

GET THE FACTS, PLAN, APPLY



Students



Military



Adult Learners

Select a student type to learn more...

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[Site Policies](#) | [Site Map](#) | [Contact](#)

LOAN AND SCHOLARSHIP PROGRAMS THE TEXAS HIGHER EDUCATION COORDINATING BOARD

Welcome to the Texas Higher Education Coordinating Board's (THECB) student loan and scholarship website! Since 1965, the [Texas Higher Education Coordinating Board](#) has provided low-interest loans and scholarships for students who are Texas residents and eligible to pay in-state tuition. On this site, you can find information regarding:

- The student loan and scholarship [options](#) available through the THECB
- [Making payments on loans](#) held by the THECB
- Various state and federal [loan forgiveness and repayment options](#)

NEW Future Occupations and Reskilling Workforce Advancement to Reach Demand (FORWARD) Loan Program

We are excited to announce that we have a new low-interest loan option for Texas students. The FORWARD Loan Program is designed for students who are at least halfway to completing specific degree or certification programs within the fields of Energy, Nursing/Patient Care, Teaching, Technology, and Transportation/Logistics. To see if your program is eligible, [refer to the full list here](#). To qualify, you must be able to complete your program within two years or less.

THECB Websites

- ✓ Student Financial Aid Programs (SFAP) Information Webpage
- ✓ College For All Texans
- ✓ HHLoans

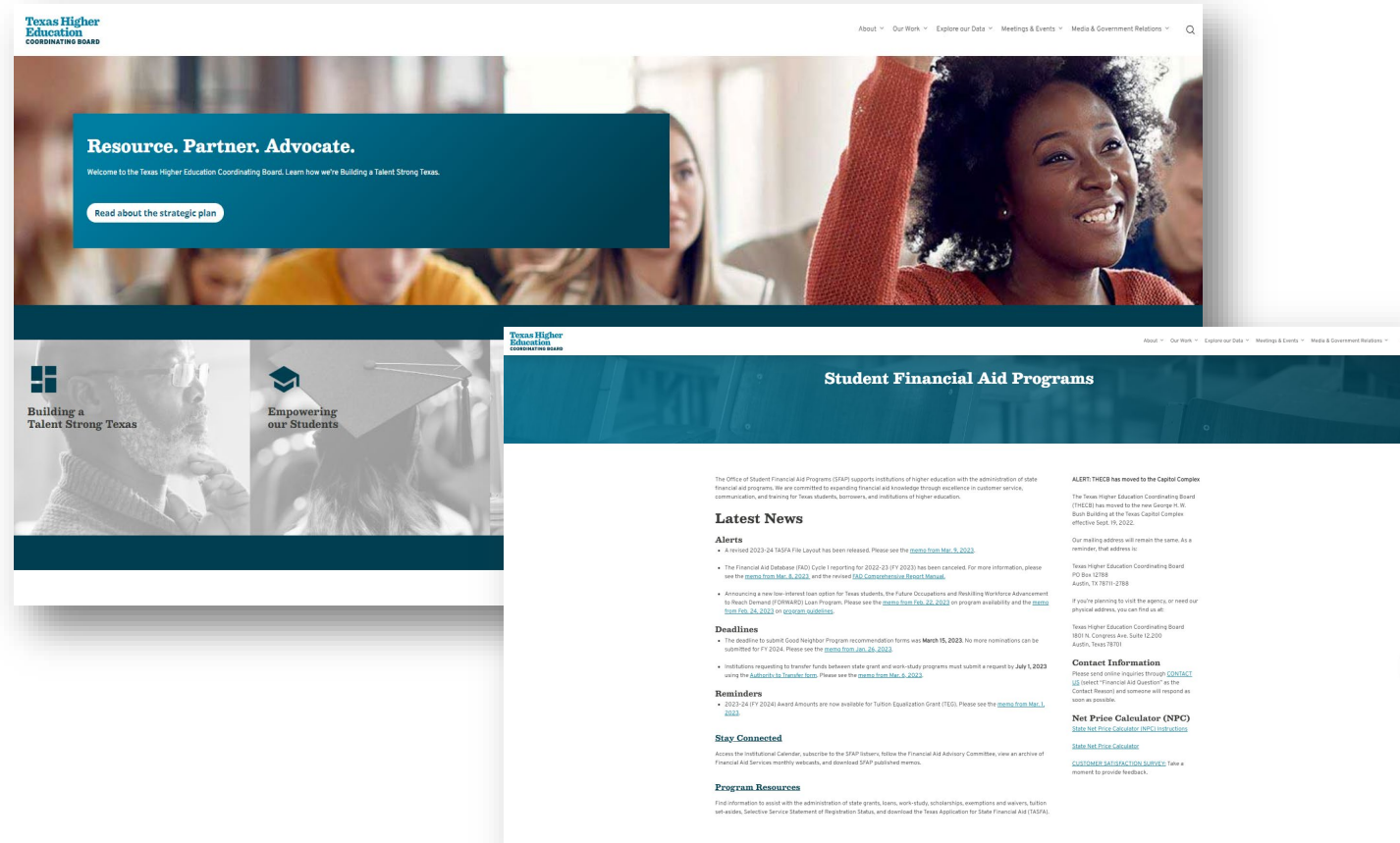
Student Financial Aid Programs (SFAP) Webpage

Institutional Resources

- Program Guidelines
- Fact Sheets
- Allocations
- Instruction Manuals
- Forms
- Flyers

Communications and Training

- Memos
- Webcasts
- Institutional Calendar



[Student Financial Aid Programs - Texas Higher Education Coordinating Board](#)

College for All Texans

- Applying for college information
- Online TASFA and paper form
- Eligibility requirements for:
 - ✓ State and Federal Grants & Scholarships
 - ✓ Loan Programs
 - ✓ Exemption & Waiver Programs
 - ✓ Texas College Work-Study Program

The screenshot shows the 'College for All Texans' website page for 'Types of Financial Aid'. The page has a dark red navigation bar on the left with the following menu items: GET ALL THE FACTS, MAKE A PLAN, FINANCIAL AID, APPLY FOR COLLEGES, and HELPFUL INFO. The main content area is light yellow and features a header image of four diverse young adults with the text 'College for All Texans' overlaid. Below the header, there is a breadcrumb trail: Home/ Get All the Facts/ Paying for College /Types of Financial Aid. The main heading is 'Types of Financial Aid'. The text explains that applying for financial aid requires work but that assistance is available if asked for. It lists three important things to remember: 1) Complete one financial aid application (FAFSA or TASFA). 2) The college's financial aid office is in charge. 3) Deadlines matter. A list of financial aid types is provided, including: Your Financial Aid Application - FAFSA or TASFA?, Exemptions, Financial Assistance Funded by Designated Tuition Set-Asides, State and Federal Grants and Scholarships, Loans, Loan Forgiveness Programs, Loan Repayment Programs, Tax Credits and Other Programs, Waiver Programs, Work Study Programs, and \$1000 Tuition Rebate Program. A red bracket on the right side of the page groups the last six items. On the right sidebar, there are links for 'College Locator', 'Net Price Calculator (NPC)', and 'Need more information? Still have questions?'. The footer of the sidebar provides contact information: 'We're here to help guide you through the financial aid process. Give us a call at 1-888-311-8881.'

[College For All Texans: Types of Financial Aid](#)

HHLoans

- Program eligibility information
- Applications for CAL, FORWARD, and TASSP
- Loan repayment information

The screenshot shows the website for the Texas Higher Education Coordinating Board's (THECB) student loan and scholarship programs. The page features a navigation menu on the left with links for 'View My Account', 'Apply Online', 'Forms - Loan and Scholarship Programs', 'Other Forms of Financial Aid', 'Loan Repayment Programs', 'Payment Options', 'Contact Information', and 'COVID-19 Information'. The main content area is titled 'LOAN AND SCHOLARSHIP PROGRAMS THE TEXAS HIGHER EDUCATION COORDINATING BOARD' and includes a welcome message and a list of program options. A sidebar on the right contains 'Stay Connected' links, an 'e-UPDATES' subscription button, and 'Announcements' for 2022 Tax Information, COVID-19 Information, Credit/Debit Card Payments, and Income-Based Repayment.

Board Student Loans Search:

Texas Higher Education COORDINATING BOARD

View My Account
Apply Online
Forms - Loan and Scholarship Programs
Other Forms of Financial Aid
Loan Repayment Programs
Payment Options
Contact Information
COVID-19 Information

LOAN AND SCHOLARSHIP PROGRAMS THE TEXAS HIGHER EDUCATION COORDINATING BOARD

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Visit the [FORWARD Loan Program](#) webpage for eligibility requirements and details about how to apply.

College Access Loan (CAL) Program

The CAL Program provides alternative education loans to Texas students who are unable to meet cost of attendance.

Visit the [CAL Program](#) webpage for eligibility requirements and details about how to apply.


Stay Connected
>>Sign up
e-UPDATES
subscribe to updates

Announcements
[2022 Tax Information](#)
[Important COVID-19 Information](#)
[Credit/Debit Card Payments](#)
[Income-Based Repayment](#)

[HHLoans](#)

Subscribe to the SFAP ListServ and Receive:

- Notifications
- THECB Financial Aid Updates
- Reminders



Texas Higher Education Coordinating Board
Office of Student Financial Aid Programs

This list is intended to provide a communication medium devoted to the sharing of information about state-funded programs administered by Texas Higher Education Coordinating Board office of Student Financial Aid Programs. Subscriptions are authorized by the Coordinating Board and are limited to Texas public and private institutions of higher education.

First Name:

Last Name:

Affiliation/Institution:

Title:

Designated Program (Optional):

Email:

Phone Number:

Address:

City:

State:

Zip Code:

I understand that my information will be stored and that periodic correspondence will be sent to the e-mail indicated.

I understand that my information will be deleted and I will no longer receive any correspondence from this listserv.

<https://www1.thecb.state.tx.us/apps/SpecialPrograms/formreq.cfm>

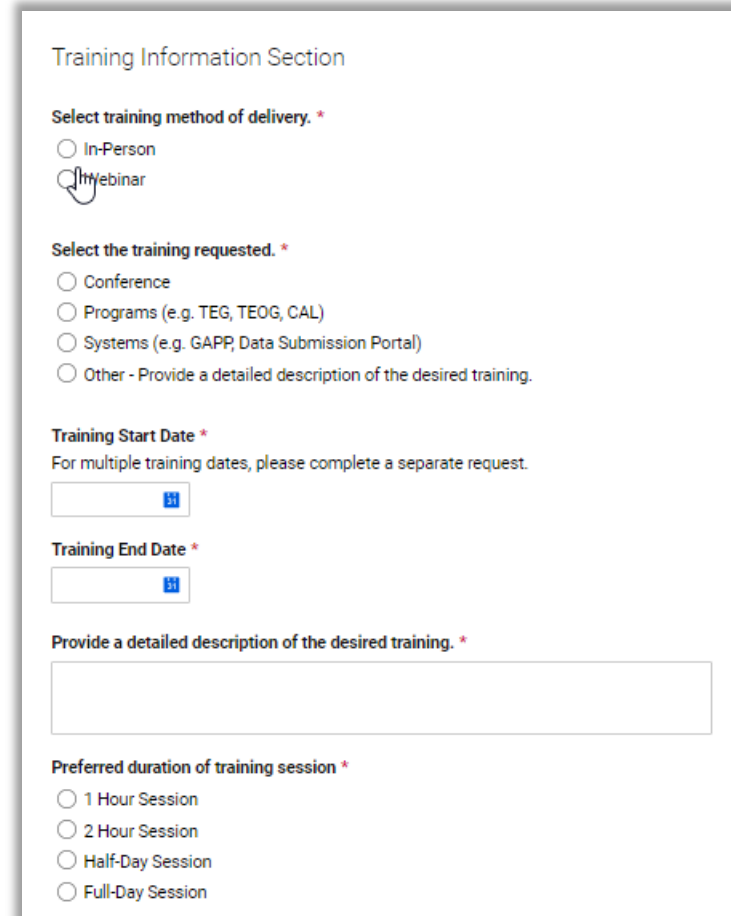
Training Requests

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.



The screenshot shows a form titled "Training Information Section" with the following fields and options:

- 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>

Contact Student Financial Aid Programs

The following phone lines are available for borrower and the public:

Borrower Services

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

Texas Financial Aid Information Center

- Public Line: (888) 311-8881

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.



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

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
- 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](#)

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

The screenshot shows the 'Create a Ticket' form in the GAPP system. The form is titled 'Create a Ticket' and is part of the Texas Higher Education Coordinating Board's interface. The form includes the following fields and elements:

- Subject:** A text input field with a red asterisk indicating it is required.
- Request Type:** A dropdown menu with a red asterisk, currently showing 'Select an Option'.
- Program Type:** A dropdown menu with a red asterisk, currently showing 'Select an Option'.
- Initial Description of Issue:** A rich text editor with a red asterisk, featuring a toolbar with options for font style (Salesforce Sans), size (12), bold (B), italic (I), underline (U), strikethrough (ABC), bulleted list, numbered list, indent, and outdent. Below the toolbar are icons for link, image, and link removal.
- Created By:** A text field showing 'PJC Tester1'.
- Upload:** A section with an 'Upload Files' button and the text 'Or drop files'.
- Buttons:** 'Cancel', 'Save as Draft', and 'Submit' buttons at the bottom right.

Need Access?

THECB System Access

User Access to THECB Systems

The certifying official, typically a Director or higher will complete this form.

Institutions can add a shared email address for loan correspondence

The certifying official will certify the form using Adobe Signature (a digital date stamp) before submitting.

User Access to Web Portals		Texas Higher Education COORDINATING BOARD	
MOVEit DMZ, CBPASS, HelmNet			
The purpose of the User Access form is to have the Director of Financial Aid or equivalent request, remove, or update levels of access to the Texas Higher Education Coordinating Board (THECB) secure web portals (MOVEit, CBPASS, and HelmNet) for institutional staff at any time during the year.			
Section I- Certifying Official Information			
<input type="checkbox"/> Check box if a NEW or Interim Director is completing this form. The THECB will remove the prior Director's access to all portals and reset a new MOVEit DMZ password for security purposes.			
Institution Information			
Institution Name:		FICE Code:	
Institution's Shared Mailbox (optional) - THECB will use this shared mailbox to notify your team regarding CAL and FORWARD manageable debt loan changes or loan disbursement delays.			
Email:			
Contact Information (Director of Financial Aid or equivalent)			
First Name:		Last Name:	Phone:
Title:		Email:	
Certification			
I certify that only authorized users under this agreement shall have appropriate level of access to HelmNet, CBPass, and MOVEit DMZ web portals.			
Certifying Official Signature:			Date:
Submission Instructions			
To submit this form, follow these steps:			
Step 1. Sign the completed form.	Step 2. Save the completed form.	Step 3. Upload the completed form.	
<ul style="list-style-type: none">Electronically sign using Adobe signature	<ul style="list-style-type: none">When saving, add your six-digit FICE code in the subject line.Example: 012345_UserAccessForm	<ul style="list-style-type: none">Use the Online Verification Form to upload a copy of the signed User Access form for the THECB to process necessary changes.	

User Access to THECB Systems

User Access

Add or remove MOVEit DMZ users

- No more than two designees are allowed

Remove CBPASS users for the following applications:

- Good Neighbor
- Data Submission

Section II - Add or Remove MOVEit DMZ

MOVEit DMZ securely collects, stores, manages, and distributes FERPA-regulated information between an institution and the THECB. This is **one shared account** for the institution. Directors are required to assign at least one designee but no more than two; Director or designees can reset the password.

Add Access	Job Title	First Name	Last Name	Email	Phone
Director of Financial Aid or equivalent					
Designee #1					
Designee #2					

Remove Access	Name	Email	Removal Reason
Designee #1			
Designee #2			

Section III - Remove CBPASS

CBPASS is used for the FAD Database Submission and the Good Neighbor Program.

- Account applications are created by the user. Instructions for creating an account: [CBPASS Quick Start Guide](#)
- Directors can only ask for CBPASS accounts to be removed using this form.

Application	Name	Email	Removal Reason
<input type="checkbox"/> CBPASS FAD Data Submission <input type="checkbox"/> CBPASS Good Neighbor Program			
<input type="checkbox"/> CBPASS FAD Data Submission <input type="checkbox"/> CBPASS Good Neighbor Program			
<input type="checkbox"/> CBPASS FAD Data Submission <input type="checkbox"/> CBPASS Good Neighbor Program			
<input type="checkbox"/> CBPASS FAD Data Submission <input type="checkbox"/> CBPASS Good Neighbor Program			

As of 10/12/2023 2 | Page

User Access to THECB Systems

Request, update, or remove HelmNet access.

Select access level as Read or Edit.

Once the User Access form is complete, institutions should use the Online Verification form to upload the form.

Section IV - Request, Update, or Remove HelmNet Access

HelmNet allows authorized personnel to update, certify, and run reports for the state programs: College Access Loan (CAL), Future Occupations & Reskilling Workforce Advancement to Reach Demand (FORWARD) Loan, and Texas Armed Services Scholarship Program (TASSP).

- To request access for a new user, select the **New User** box and enter the user information.
- To update an existing user account, select the **Update** box and enter the updated user information. Then enter the user's prior information in the row below.
- To remove an account, use the **Remove HelmNet User Accounts** and enter the user information.

Note: All accounts need to enter an access level of read or edit, under the Access Level column. If the Access Level is left blank, the account will be set to read only.

Add HelmNet	Job Title	First Name	Last Name	Email	Phone	Access Level (Read/Edit)
New User <input type="checkbox"/>						
Update <input type="checkbox"/>						
Prior Information						
New User <input type="checkbox"/>						
Update <input type="checkbox"/>						
Prior Information						
New User <input type="checkbox"/>						
Update <input type="checkbox"/>						
Prior Information						
New User <input type="checkbox"/>						
Update <input type="checkbox"/>						
Prior Information						

Remove HelmNet User Accounts	Name	Email	Removal Reason

A woman in a white lab coat is looking at a laptop screen in a laboratory setting. The background is a dark teal color with a faint image of the woman and the laptop. The text is overlaid on this background.

Texas Higher Education

COORDINATING BOARD

Questions?

Thank you!

We appreciate your feedback.
Please take a moment to complete
our survey.

