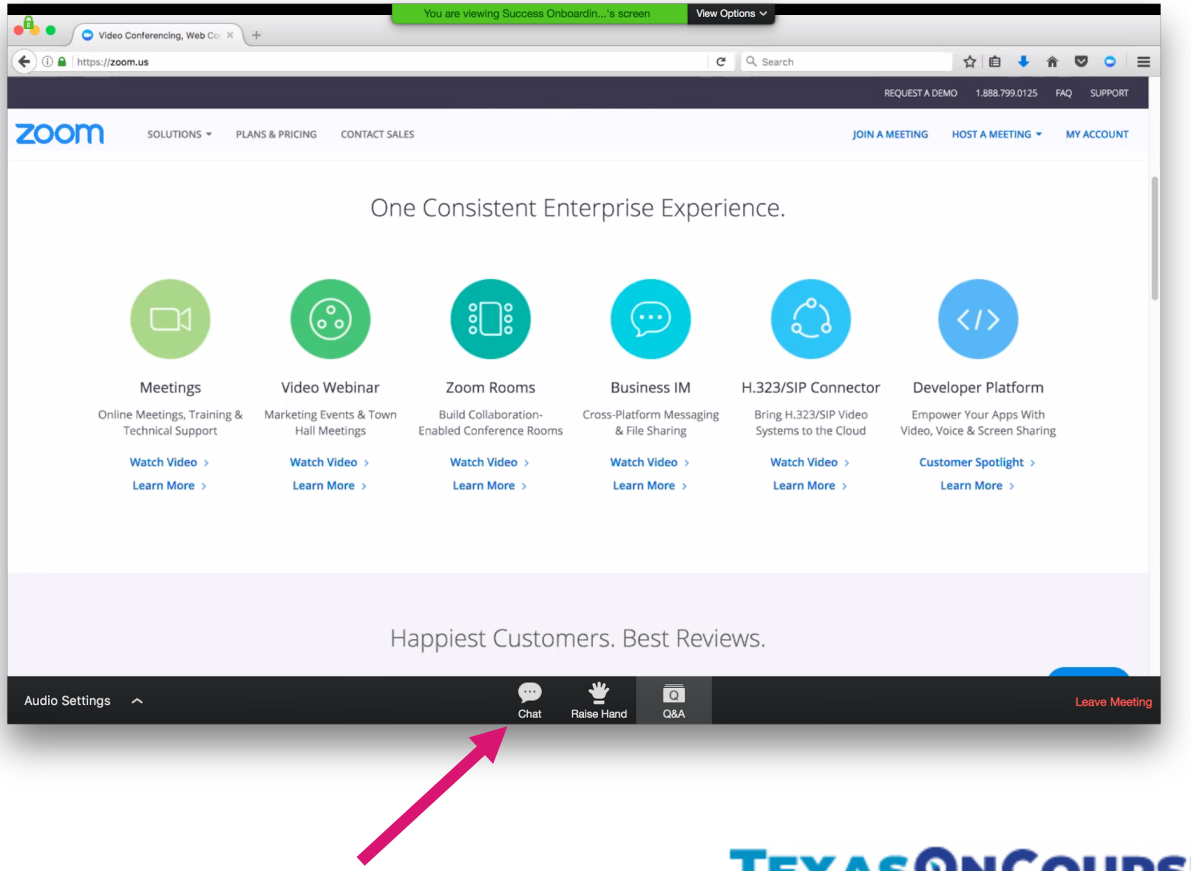
Welcome!

While we wait for everyone to get started...

- Use the chat box to say hello and introduce yourself. Thanks for joining!
- **Next: Do you have a favorite fall activity?**

We will start at 10:00 a.m.!



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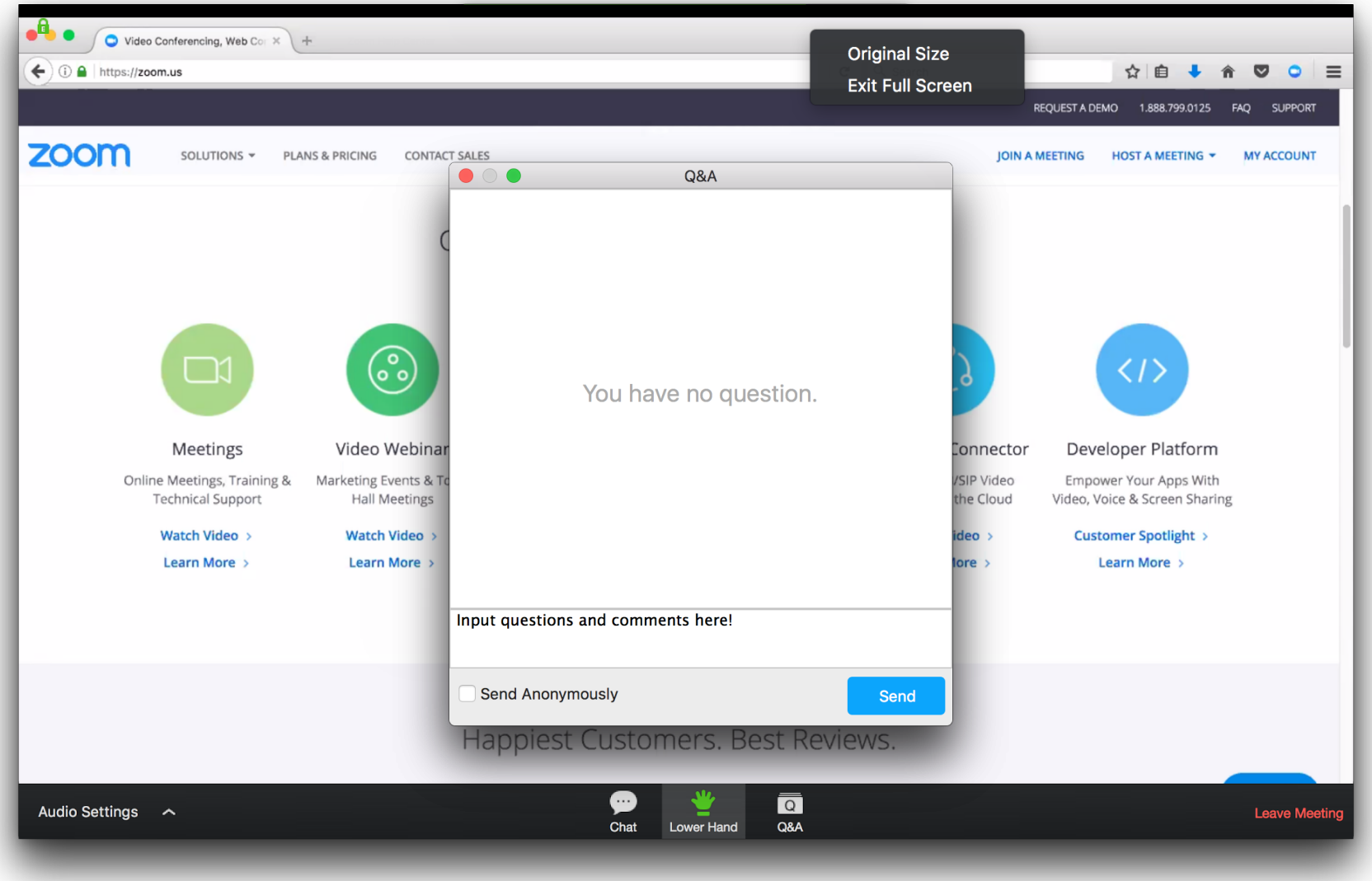
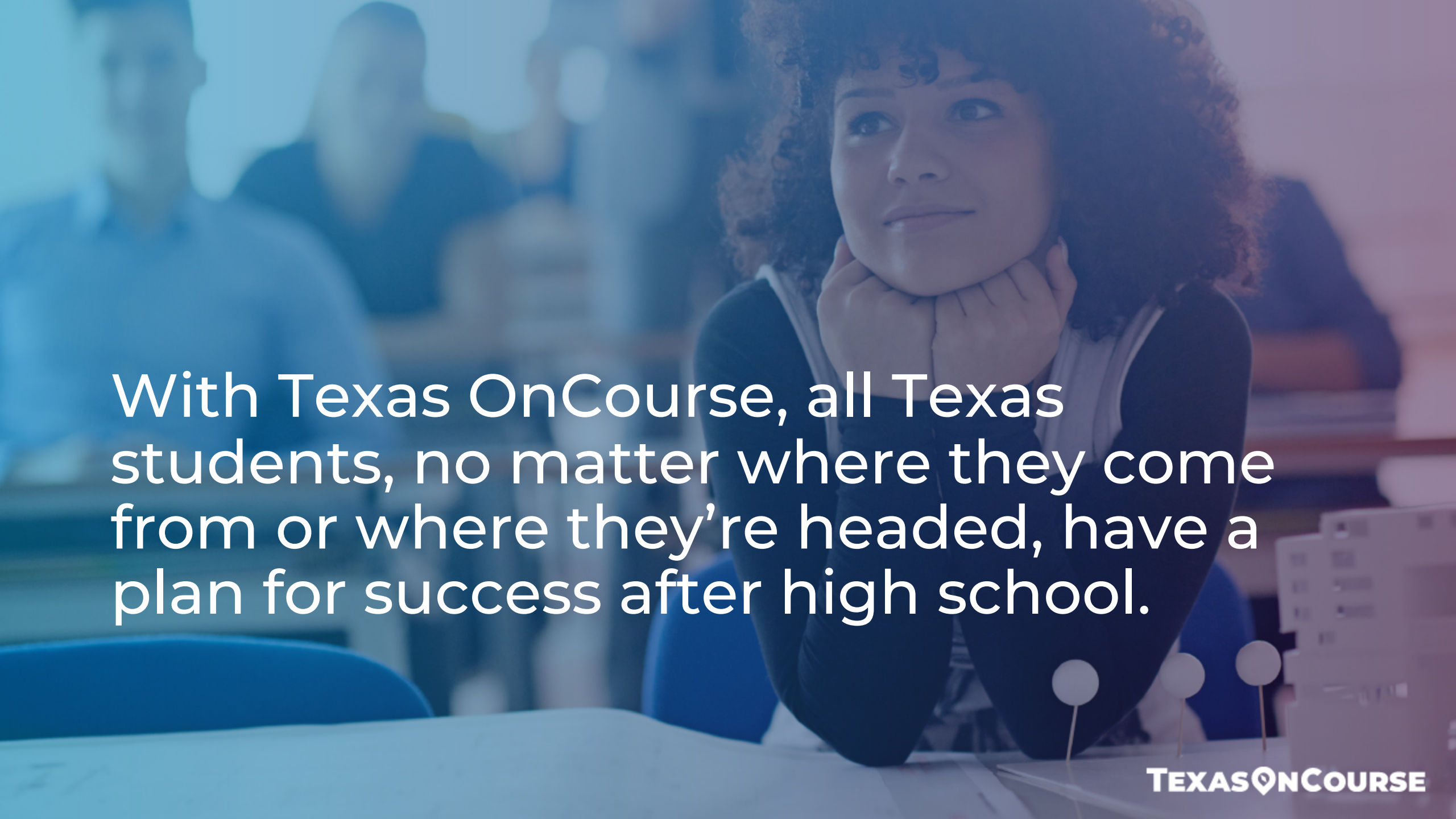
Participation and Interaction



Meeting Texas Financial Aid Requirements with the Class of 2022


With Texas OnCourse, all Texas students, no matter where they come from or where they're headed, have a plan for success after high school.
TEXAS ON COURSE

Don't forget to like and subscribe on YouTube!

Texas OnCourse
182 subscribers

youtube.com/c/TexasOnCourse

YouTube

Agenda

- Welcome
- TEA FAFSA requirements
  - Josie Brunner, Data Strategist, CCMP
- FAFSA updates and tips
  - Jaslyn Rose, Director of Content and Resources
- Important TASFA information
  - Sam Kimmel, Program Coordinator – High School
  - Resource Spotlight

Lara Gueguen

Director of Program Implementation

Texas OnCourse

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Josie Brunner

Data Strategist
College, Career, and Military Preparation Division
Texas Education Agency
Josie.Brunner@tea.texas.gov

Jaslyn Rose

Director of Content and Resources

Texas OnCourse - THECB

Sam Kimmel

Program Coordinator – High School

Texas OnCourse

What questions do you have about the financial aid requirement this year?

Let us know your responses in the chat box.

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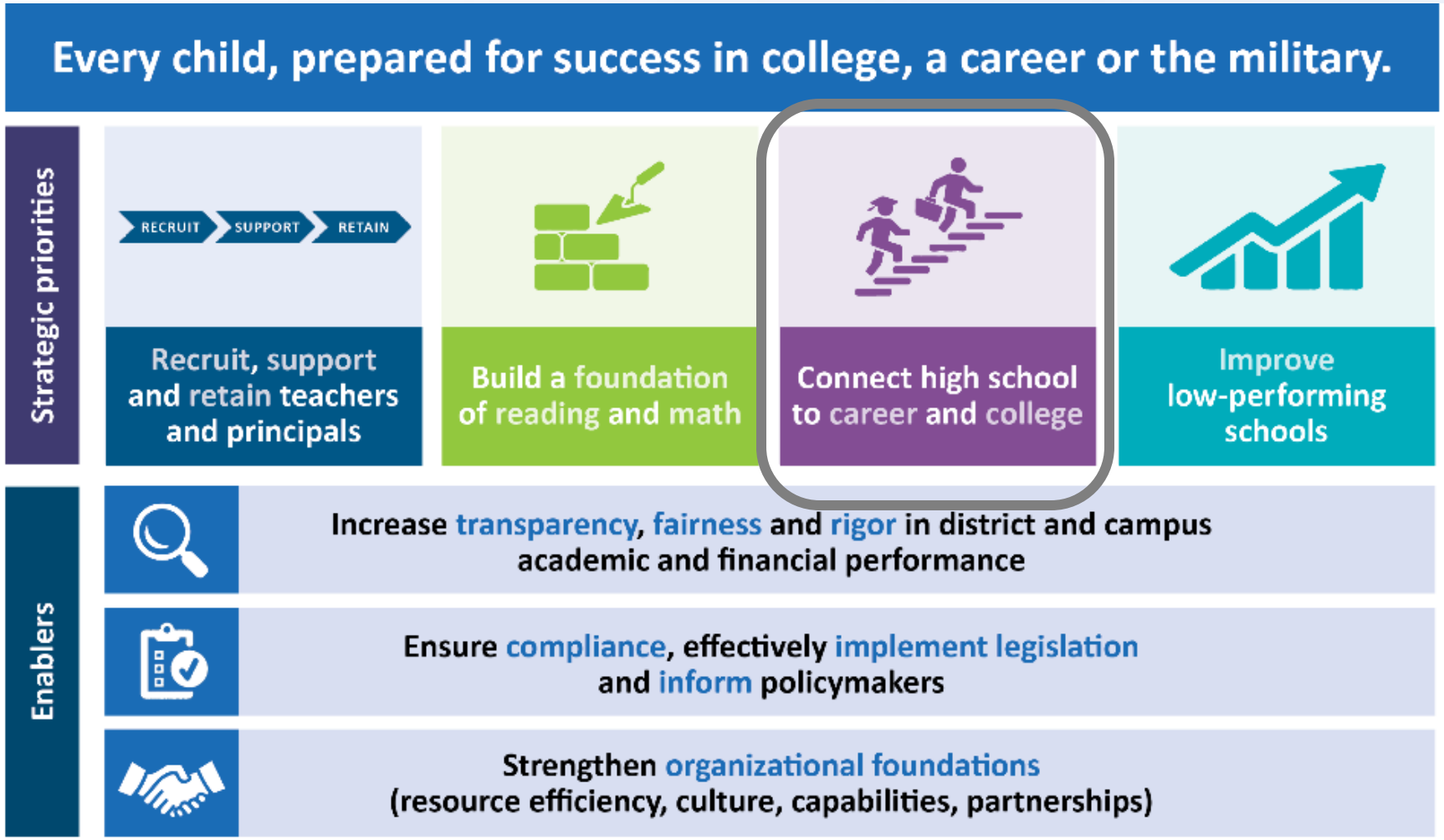
Texas Education Agency

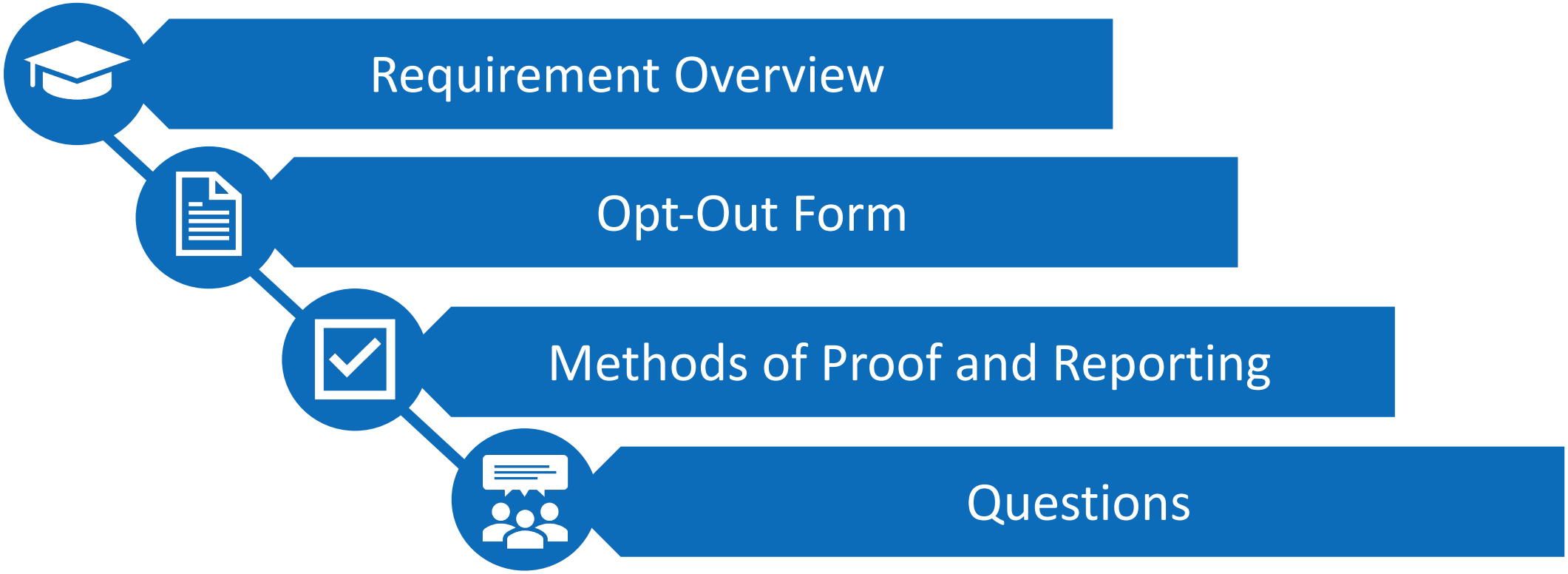
Financial Aid Application Graduation Requirement

Fall 2021

Texas Education Agency Strategic Plan



Agenda


Requirement Overview
Opt-Out Form
Methods of Proof and Reporting
Questions

HB 3 Changes – Financial Aid Application Requirement

New Graduation Requirement

Beginning in **2021-2022**, each student must do one of the following in order to graduate:

- complete and submit a **free application for federal student aid (FAFSA)**
- complete and submit a **Texas application for state financial aid (TASFA)**
- submit a **signed opt-out form**

TEA must establish and convene an advisory committee to develop recommendations for adoption of rules including implementation of the new requirement and related timelines.

Key Takeaway

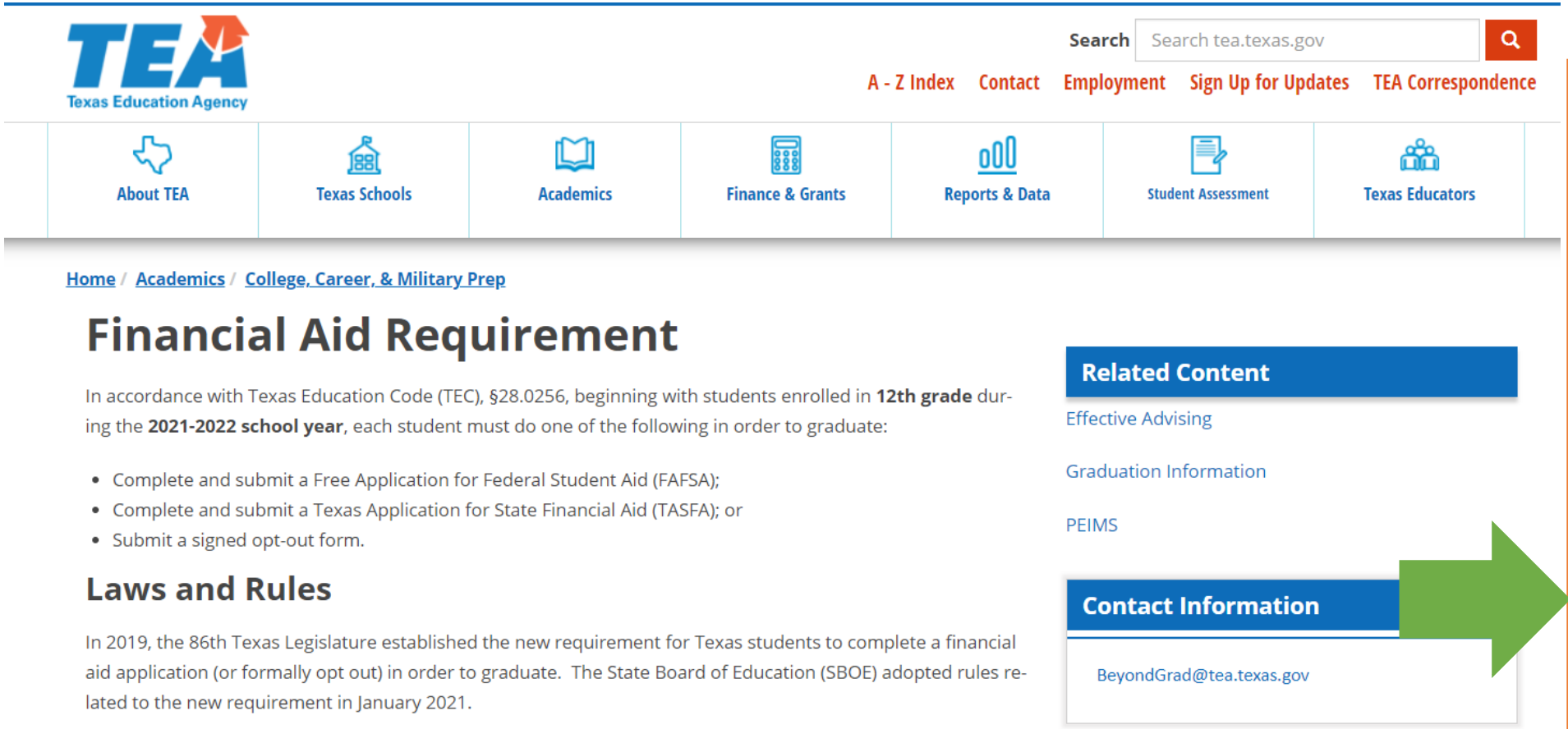
This requirement applies beginning with students enrolled in **12th grade** during the **2021-2022 school year**.

Financial Aid Application Graduation Requirement

TEA Actions

- ✓ Convened an Advisory Committee
- ✓ Submitted a report to the Texas Legislature
- ✓ Approved data elements for reporting requirement in TSDS PEIMS
- ✓ Developed opt-out form
- ✓ Supported SBOE to adopt administrative rules
- ✓ Files proposed Commissioner's rules

TEA Financial Aid Requirement Website



- ✓ **Laws and Rules**
  - Commissioner's Rules
  - SBOE Rules
- ✓ **Opting Out**
- ✓ **Reporting**
- ✓ **Training and Resources**
- ✓ **Additional Guidance**

https://tea.texas.gov/academics/college-career-and-military-prep/financial-aid-requirement

Opting Out

A student may opt out of the financial aid application graduation requirement if:

- a parent or guardian submits a signed form;
- the student is 18 years of age or older or an emancipated minor under Chapter 31, Texas Family Code and submits a signed form; or
- a school counselor authorizes the student to decline to complete and submit the application for good cause.

Important to note:

- **Student** must sign in each scenario
- Form available in English in Spanish on TEA site
- Define “good cause” locally

Financial Aid Application Opt-Out Form

Financial aid applications inform postsecondary institutions’ decisions about student eligibility for federal, state, and institutional funds. Financial aid awards can help students pay for their educational expenses after high school.

Each high school senior in a Texas public school district or open enrollment charter school must complete and submit a Free Application for Federal Student Aid (FAFSA) or a Texas Application for State Financial Aid (TASFA) as a state requirement for graduation. Texas Education Code §28.0256 allows a student to opt out of the financial aid application graduation requirement by submitting a signed form that authorizes the student to decline.

To authorize a student to opt out of the financial aid application graduation requirement, the Financial Aid Application Opt-Out Form must be signed by one of the following:

OPTION I: A student age 18 years or older or emancipated minor under Chapter 31, Texas Family Code
OPTION II: The student’s parent or guardian and the student
OPTION III: A school counselor, for good cause as determined by the school counselor, and the student

Students under 18 years of age may only be authorized to decline under OPTION II or OPTION III.

Student Printed Name:	**Date of Birth:**
District/Charter School:	**Campus:**

Submitting a *Financial Aid Application Opt-Out Form* does not prohibit a student from completing and submitting a financial aid application at any time in the future.

OPTION I: STUDENT AUTHORIZATION

My signature below certifies that **I am 18 years of age or older or an emancipated minor** and am authorized to decline to complete and submit a financial aid application on my own behalf.

Student Signature:	**Date:**

OPTION II: PARENT AUTHORIZATION

My signature below authorizes my child to decline to complete and submit a financial aid application.

Parent/Legal Guardian Signature:	**Date:**

Parent/Legal Guardian Printed Name:

I am under the age of 18 and with my parent’s authorization, I decline to complete and submit a financial aid application.

Student Signature:	**Date:**

OPTION III: COUNSELOR AUTHORIZATION

My signature below certifies that reasonable efforts to fulfill obligations to the student have been made, but for good cause I have authorized the student to decline to complete and submit a financial aid application.

School Counselor Signature:	**Date:**

School Counselor Printed Name:

I am under the age of 18 and with my counselor’s authorization, I decline to complete and submit a financial aid application.

Student Signature:	**Date:**

Opting Out

Only Option III requires good cause.

Financial Aid Application Opt-Out Form	
Financial aid applications inform postsecondary institutions' decisions about student eligibility for federal, state, and institutional funds. Financial aid awards can help students pay for their educational expenses after high school. Each high school senior in a Texas public school district or open enrollment charter school must complete and submit a Free Application for Federal Student Aid (FAFSA) or a Texas Application for State Financial Aid (TASFA) as a state requirement for graduation. Texas Education Code §28.0256 allows a student to opt out of the financial aid application graduation requirement by submitting a signed form that authorizes the student to decline. To authorize a student to opt out of the financial aid application graduation requirement, the Financial Aid Application Opt-Out Form must be signed by one of the following: OPTION I: A student age 18 years or older or emancipated minor under Chapter 31, Texas Family Code OPTION II: The student's parent or guardian and the student OPTION III: A school counselor, for good cause as determined by the school counselor, and the student *Students under 18 years of age may only be authorized to decline under OPTION II or OPTION III.*	
Student Printed Name:	**Date of Birth:**
District/Charter School:	**Campus:**

Submitting a *Financial Aid Application Opt-Out Form* does not prohibit a student from completing and submitting a financial aid application at any time in the future.

Opting Out

A student only needs to sign the form once under the applicable option.

OPTION I: STUDENT AUTHORIZATION	
My signature below certifies that **I am 18 years of age or older or an emancipated minor** and am authorized to decline to complete and submit a financial aid application on my own behalf.	
Student Signature:	**Date:**
OPTION II: PARENT AUTHORIZATION	
My signature below authorizes my child to decline to complete and submit a financial aid application.	
Parent/Legal Guardian Signature:	**Date:**
Parent/Legal Guardian Printed Name:	
I am under the age of 18 and with my parent's authorization, I decline to complete and submit a financial aid application.	
Student Signature:	**Date:**
OPTION III: COUNSELOR AUTHORIZATION	
My signature below certifies that reasonable efforts to fulfill obligations to the student have been made, but for good cause I have authorized the student to decline to complete and submit a financial aid application.	
School Counselor Signature:	**Date:**
School Counselor Printed Name:	
I am under the age of 18 and with my counselor's authorization, I decline to complete and submit a financial aid application.	
Student Signature:	**Date:**

Method of proof of completion and submission of FAFSA

FAFSA completion and submission may be confirmed through:

- **date represented in the "FAFSA Process date" field in ApplyTexas Counselor Suite FAFSA data; or**
- **notification from USDE that demonstrates a student has completed and submitted a FAFSA, such as an email confirmation of submission; or**
- **alternate proof of FAFSA completion that may be provided by a student, based on the local policy developed by a district. Some examples may include:**
  - Screenshot of FAFSA submission acknowledgement page
  - Financial aid award letter from an IHE
  - Other, as established by local policy

Method of proof of completion and submission of TASFA

School districts must develop a local policy for the method of proof that the student has completed a TASFA. Some examples may include:

- Acknowledgement of receipt from an IHE
- Copy of signature page
- Screenshot of TASFA submission acknowledgement page (from those institutions that offer an electronic form)
- Other, as established by local policy

Note: The process for TASFA submission is not standard for all Texas institutions. There is currently no centralized source to verify submission and completion of a TASFA electronically.

Reporting Requirements – TREx
Financial-Aid-Application-Code (TE139)

Beginning in school year 2021-22, new data elements will be entered in the Texas Records Exchange (TREx) System to track students' completion of the graduation requirement for the student record.

Common Name	XML Name	Complex Type	Date Issued	Date Updated
FINANCIAL-AID-APPLICATION-CODE	FinancialAidApplication	AcademicStatusType	8/1/2021	

Definition

FINANCIAL-AID-APPLICATION-CODE indicates the manner in which the student completed the graduation requirement of either submitting a financial aid application (FAFSA or TASFA) or submitting an exception.

Special Instructions

None

Data Specifications

Element ID	Code Table ID	Required?	Domain of Values
TE139	TC46	No	
Applicable Record	**Length**	**Type**	**Pattern**
Student Record AAR-Transcript	2	Coded	##

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FINANCIAL-AID-APPLICATION-CODE indicates the manner in which the student completed the graduation requirement of either submitting a financial aid application (FAFSA or TASFA) or submitting an exception.

Special Instructions

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Data Specifications

Element ID	Code Table ID	Required?	Domain of Values
TE139	TC46	No	
Applicable Record	**Length**	**Type**	**Pattern**
Student Record AAR-Transcript	2	Coded	##

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Reporting Requirements – TREx
Financial-Aid-Application-Code (TC46)

Code Table ID	Code Table Name	XML Name	Date Issued	Date Updated
TC46	FINANCIAL-AID-APPLICATION-CODE	FinancialAidApplicationCode	8/1/2021	
Code	**Translation**			
01	Financial application form completed			
02	Exception Submitted			

Opt-Out Form

Note: These codes will be the same as the codes used for TSDS PEIMS.

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Reporting Requirements – TREx
Financial-Aid-Application-Met-Date (TE140)

Note: The FAFSA and TASFA applications does not open until **October 1** in a school year.

Common Name	XML Name	Complex Type	Date Issued	Date Updated
FINANCIAL-AID-APPLICATION-REQUIREMENT-MET-DATE	FinancialAidApplicationMetDate	AcademicStatusType	8/1/2021	

Definition
FINANCIAL-AID-APPLICATION-REQUIREMENT-MET-DATE indicates the month and year that the student completed a financial aid application (FAFSA or TASFA) or submitted an exception.

Special Instructions
None

Data Specifications			
Element ID	**Code Table ID**	**Required?**	**Domain of Values**
TE140		No	yyyy=1957-2052 mm= 01-12
Applicable Record	**Length**	**Type**	**Pattern**
Student Record AAR-Transcript	7	Date	yyyy-mm

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Reporting Requirements - TSDS PEIMS
Financial Aid Application Code (E1724)

Beginning in fall of **school year 2022-23 for Submission 1**, districts will be required to report the financial aid application graduation requirement in TSDS PEIMS for 2021-22 graduates.

- Data standards will be published December 2021

FINANCIAL-AID-APPLICATION-CODE indicates the manner in which the student completed the graduation requirement by either completing a financial aid application (FAFSA or TASFA) or submitting an exception.

Note: Districts are not asked what financial aid application form (i.e., the FAFSA or TASFA) was completed.

Financial-Aid-Application-Indicator	
01	Financial application form completed
02	Exception filed

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Reporting Timeline for 2021-22 Graduates

School Year (SY) 2021-22

Fall 2021
Districts begin entering TREx data

FAFSA opens for new applications (2022–23)
October 1

FAFSA reports available in ApplyTX Counselor Suite
Late October

TASFA encouraged window
October 1 – mid-January

Spring 2022
Class of 2022 graduates

FAFSA closes for new application (2021–22)
June 30

School Year 2022-23

Fall 2022
TSDS PEIMS reporting for 2022 graduates

Last day for FAFSA corrections
September 10

2022-23 FAFSA data no longer available in ApplyTX CS
September 30

Contact

CASSTeam@tea.texas.gov

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FAFSA Updates and Tips

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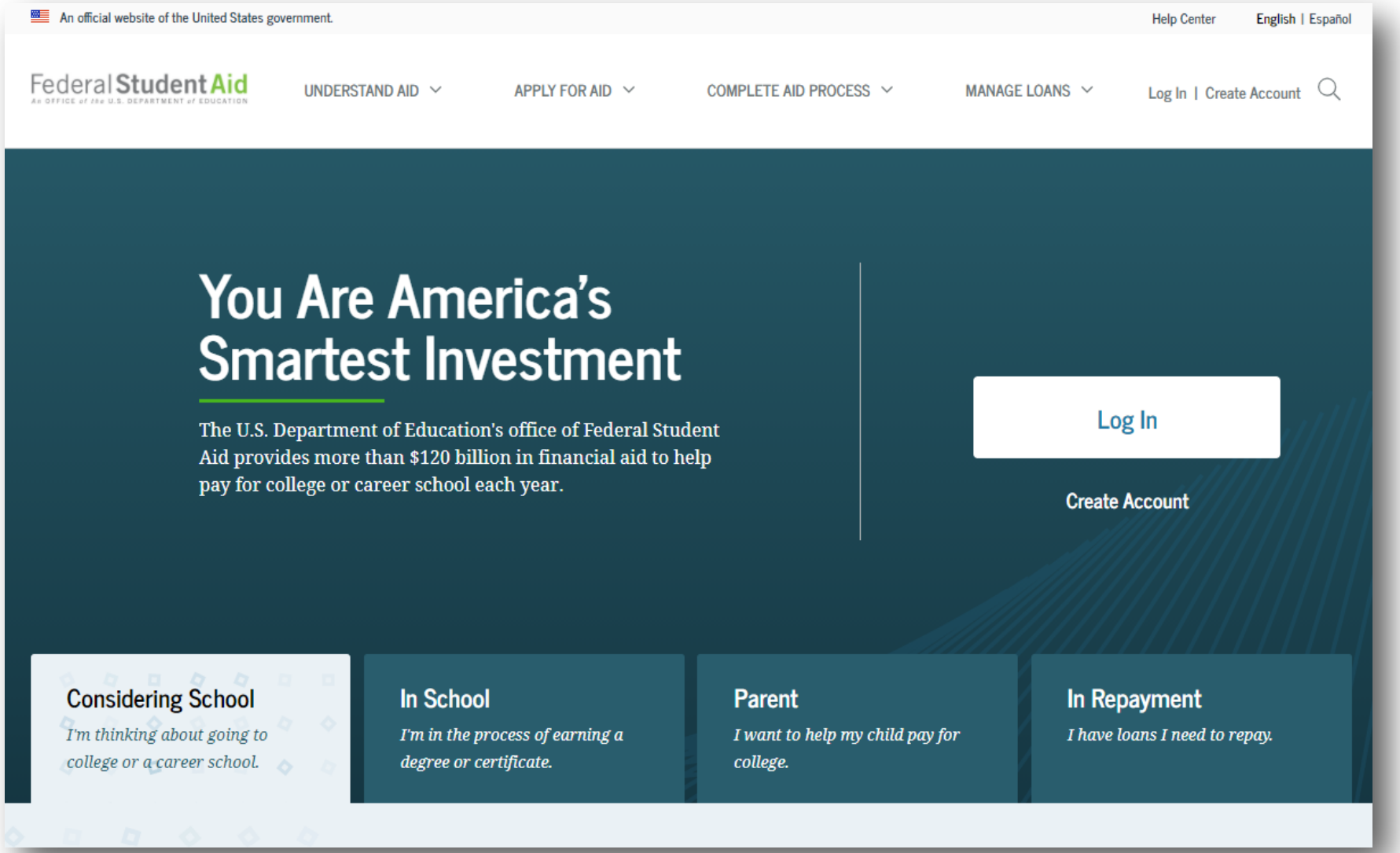
What is the FAFSA?

Free **A**pplication for **F**ederal **S**tudent **A**id

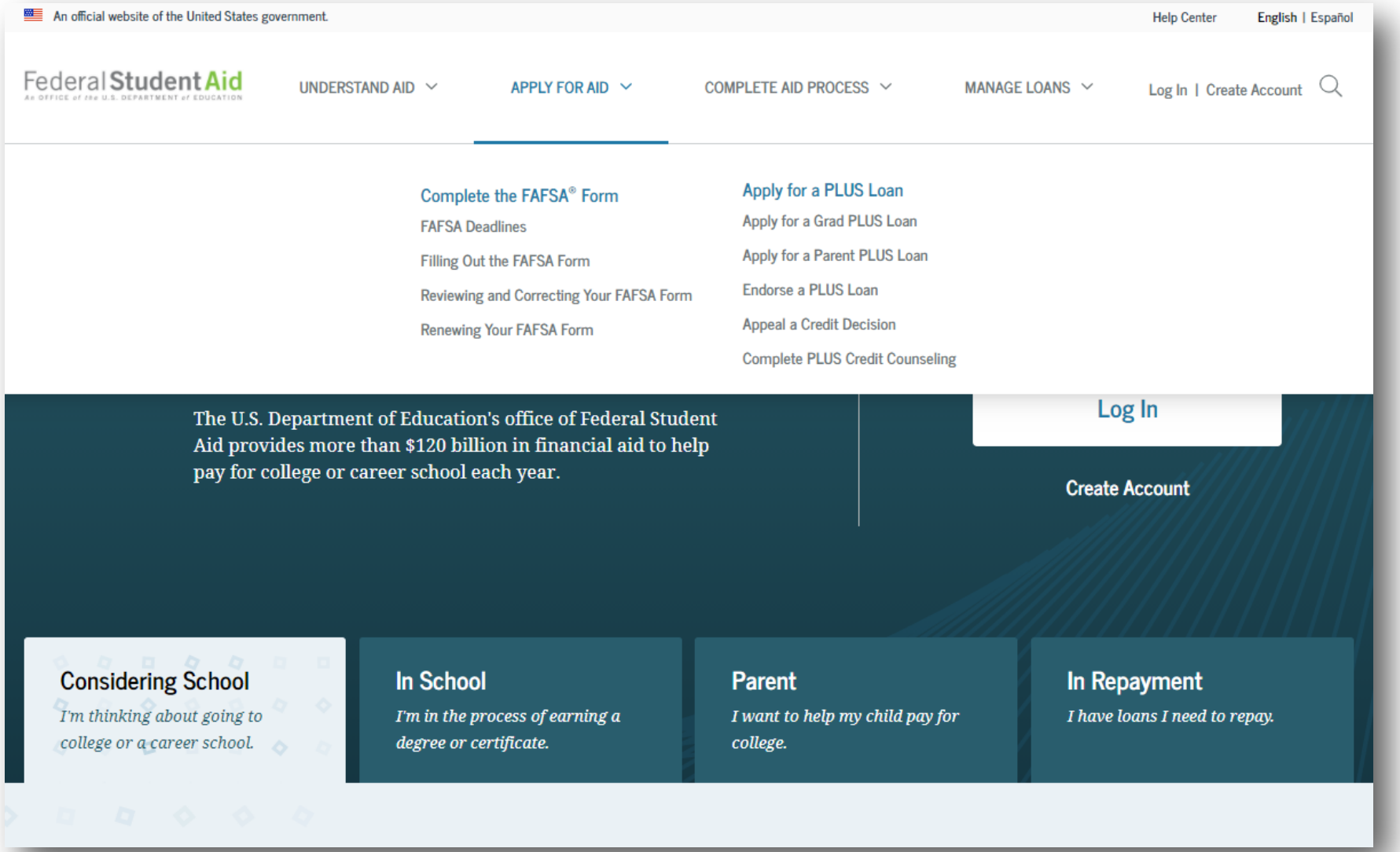
Available **October 1**

Complete by **earliest** deadline

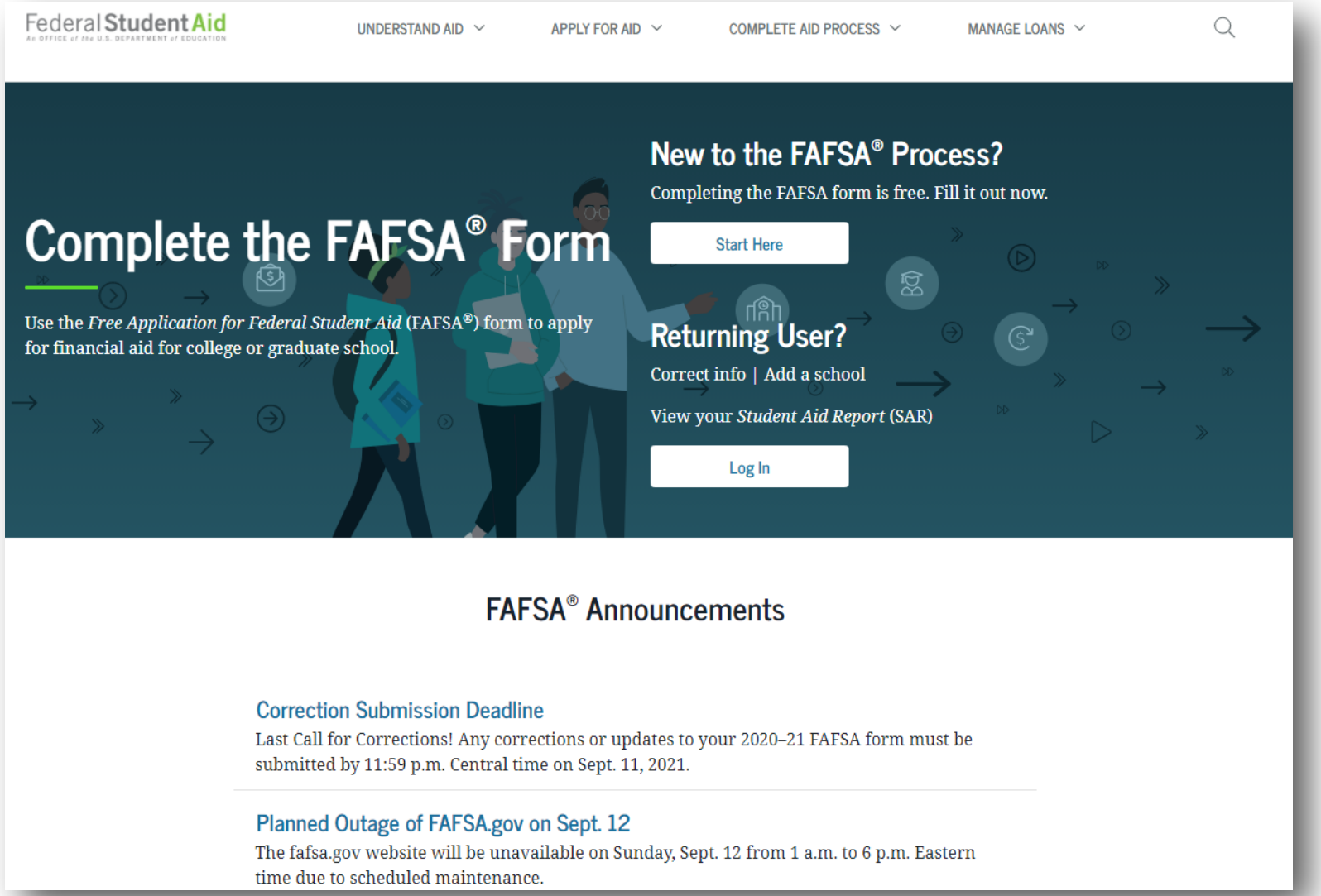
StudentAid.gov Home



Apply for Aid



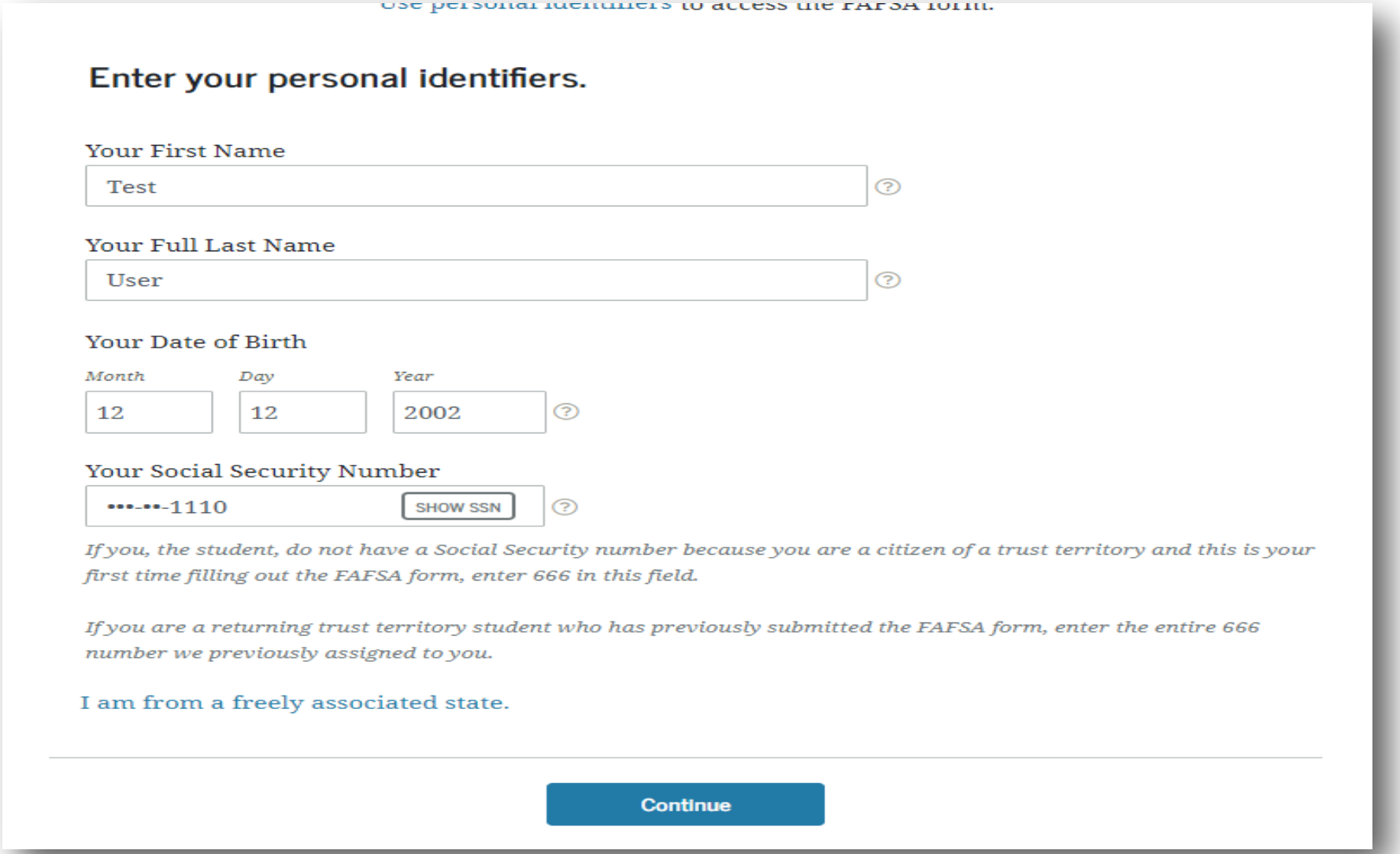
FAFSA Form Welcome Page



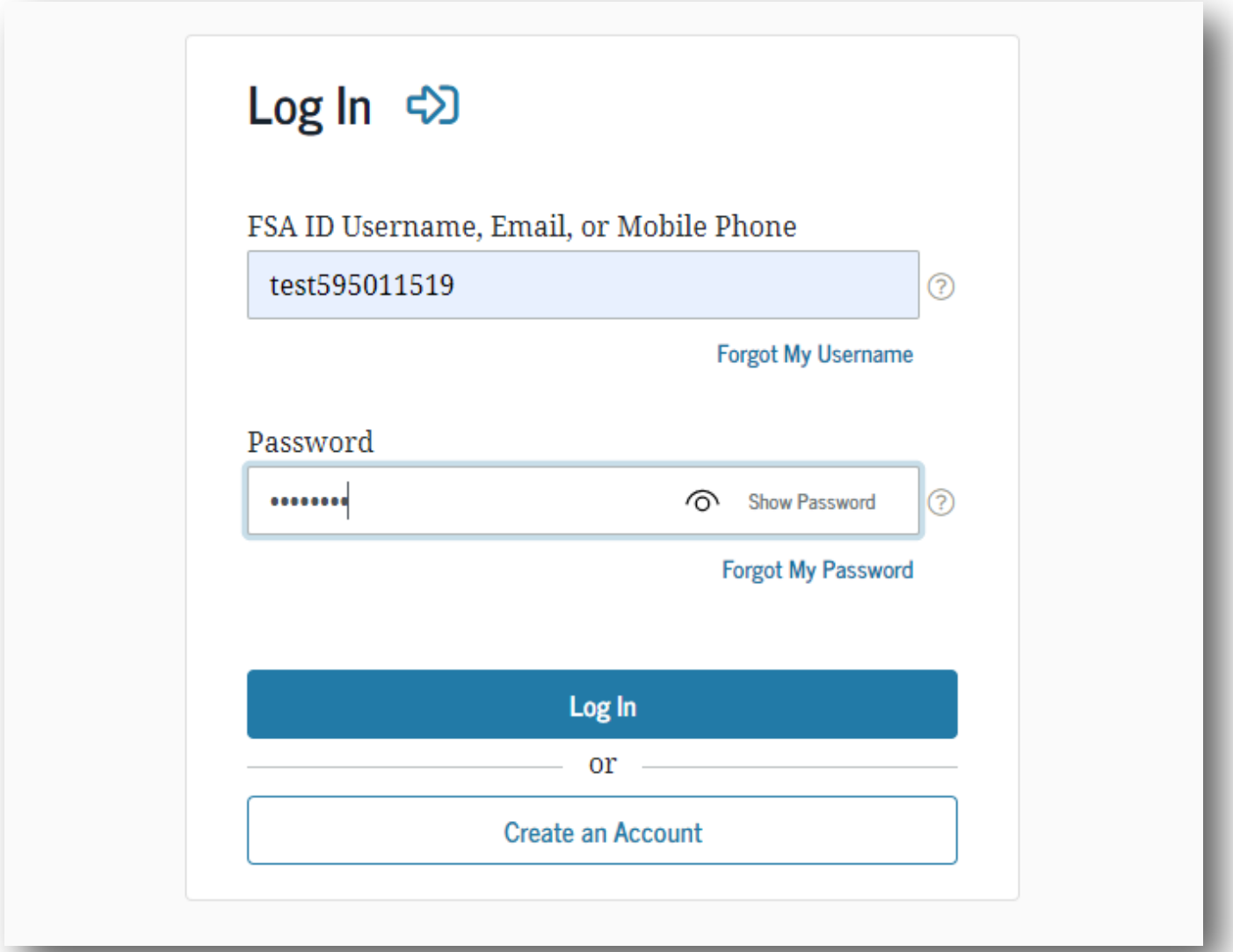
Role Selection – Options

Role Selection – FSA ID

Role Selection – Personal Identifiers



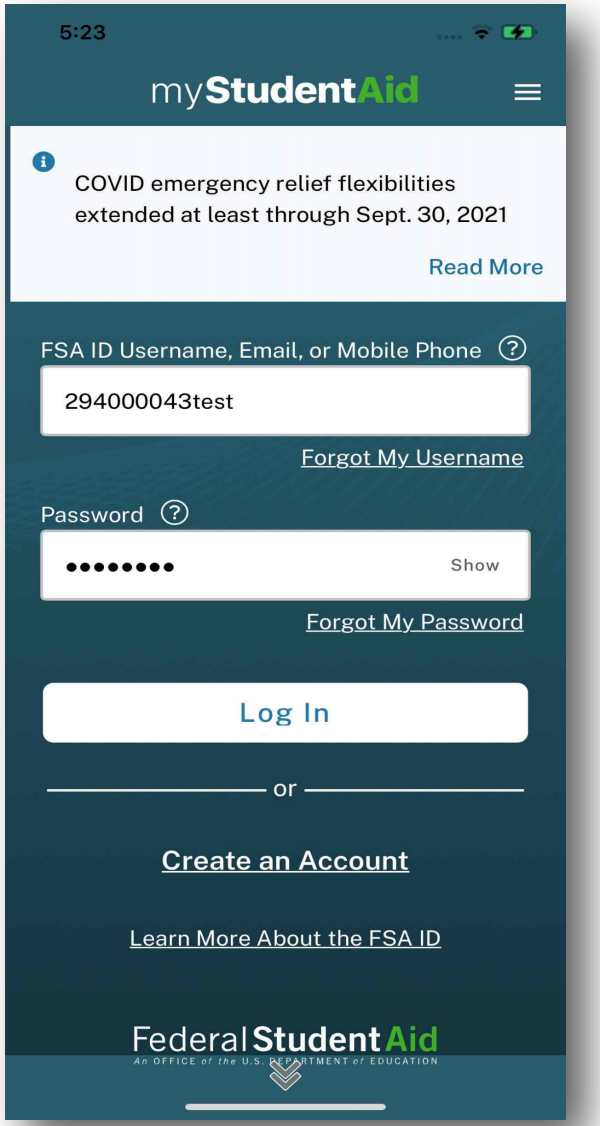
Log In Page

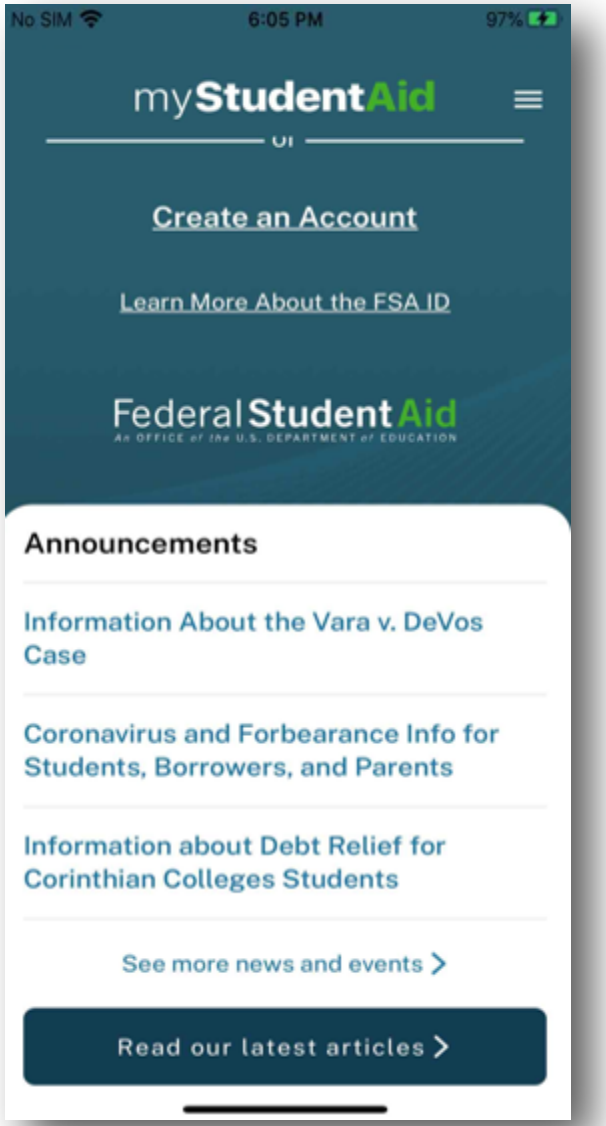

Log In
FSA ID Username, Email, or Mobile Phone
test595011519
Forgot My Username
Password
Show Password
Forgot My Password
Log In
or
Create an Account

Mobile App

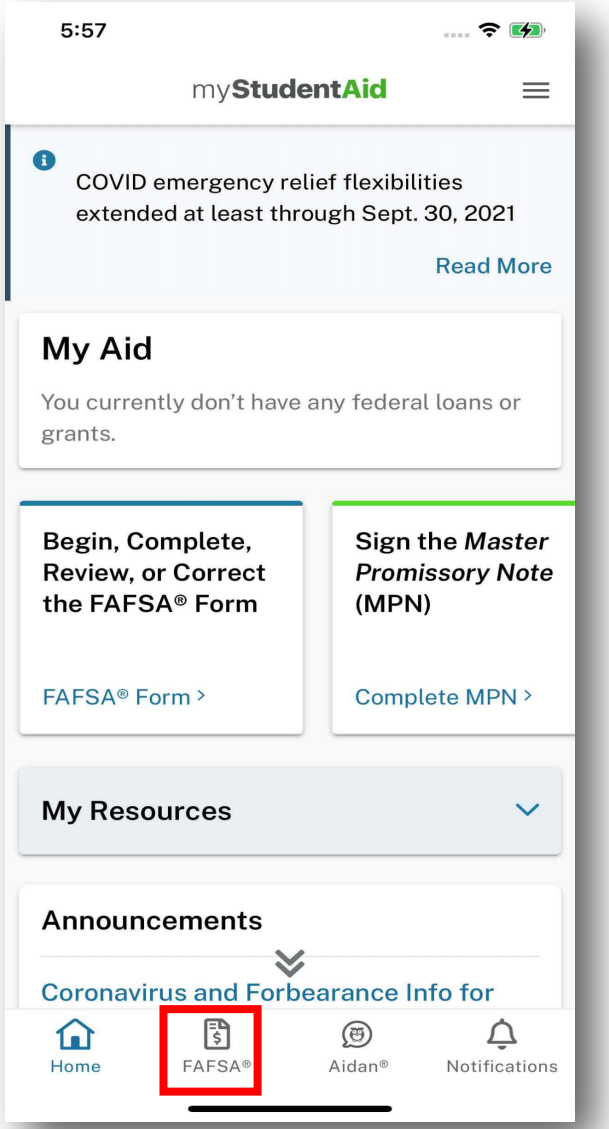
TEXAS ON COURSE

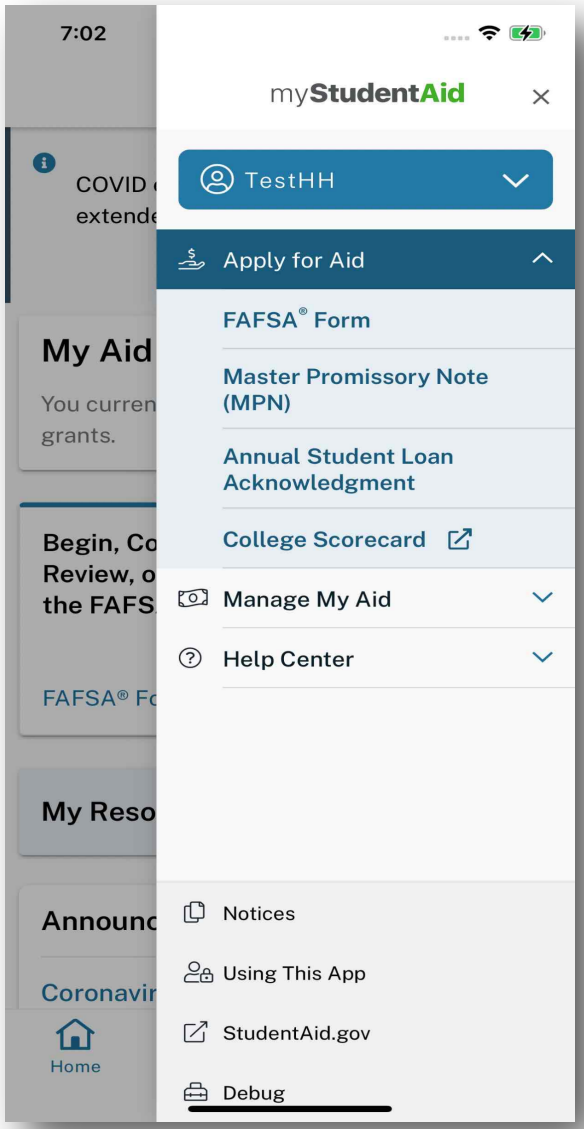
myStudentAid Log In



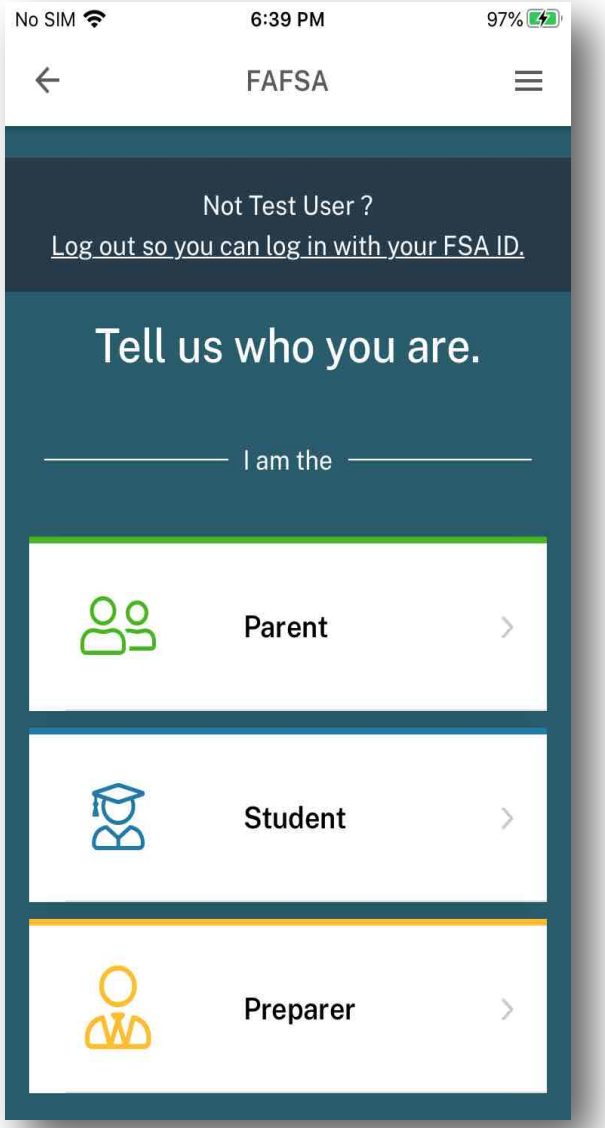


Dashboard and Hamburger Menu





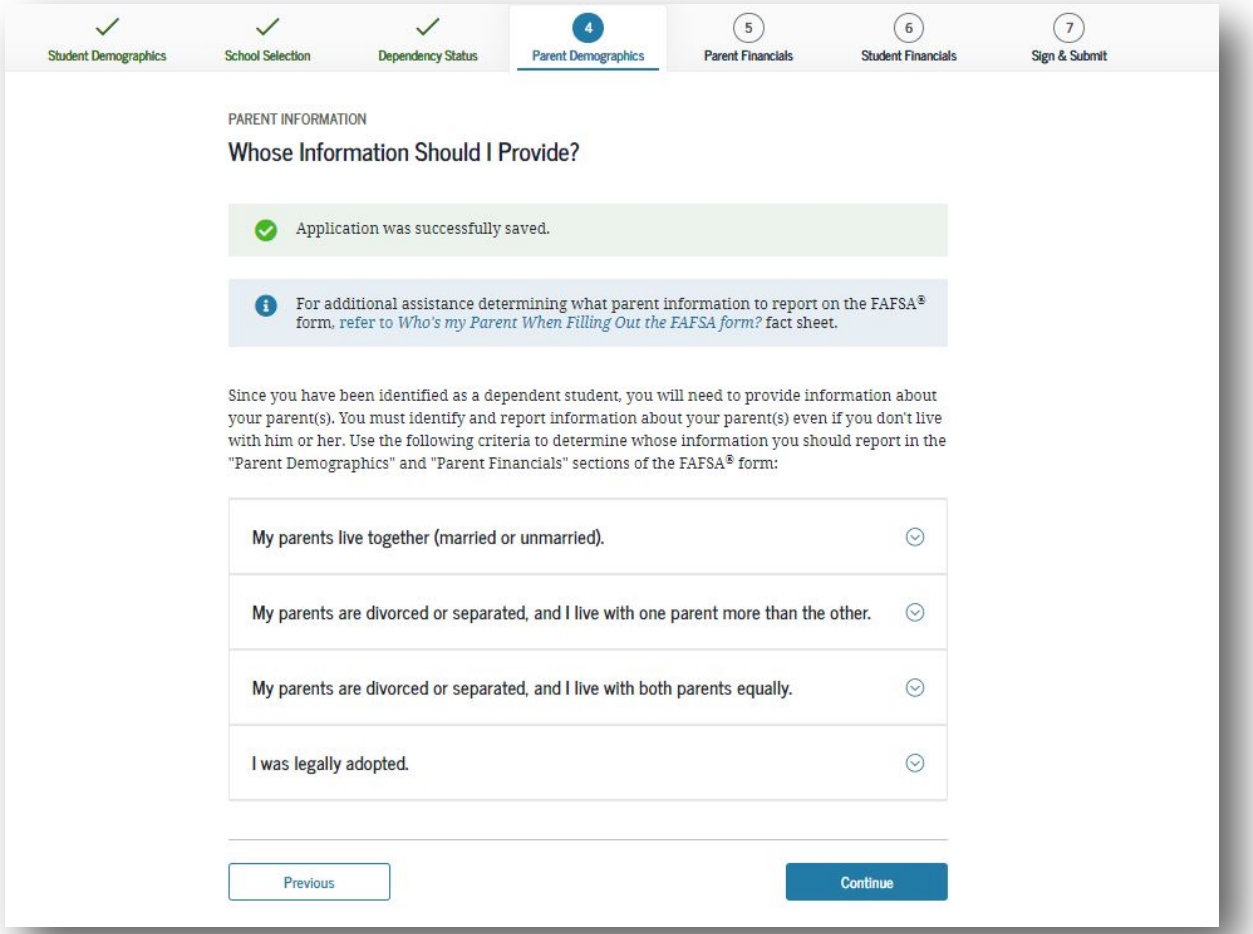
Role Selection



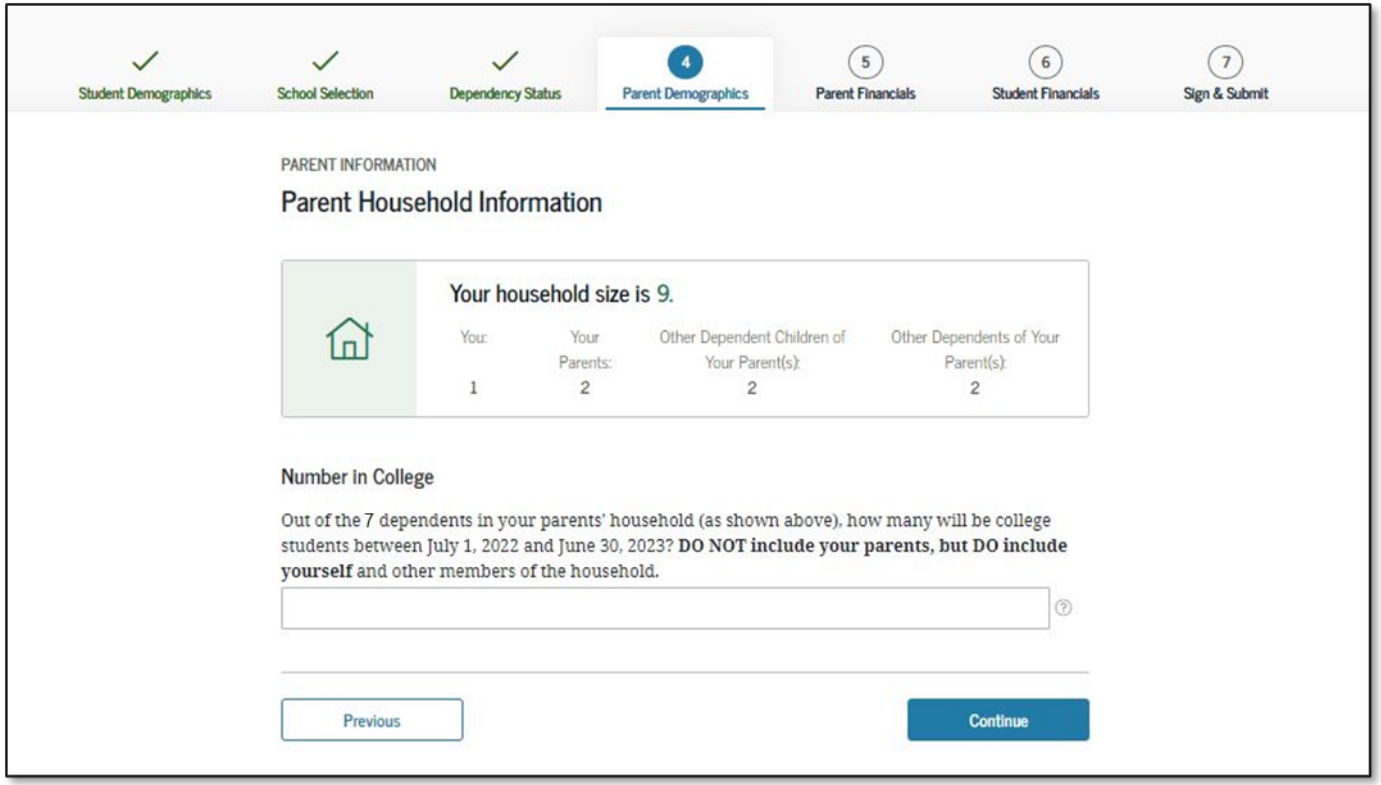
Other Updates

TEXAS ON COURSE

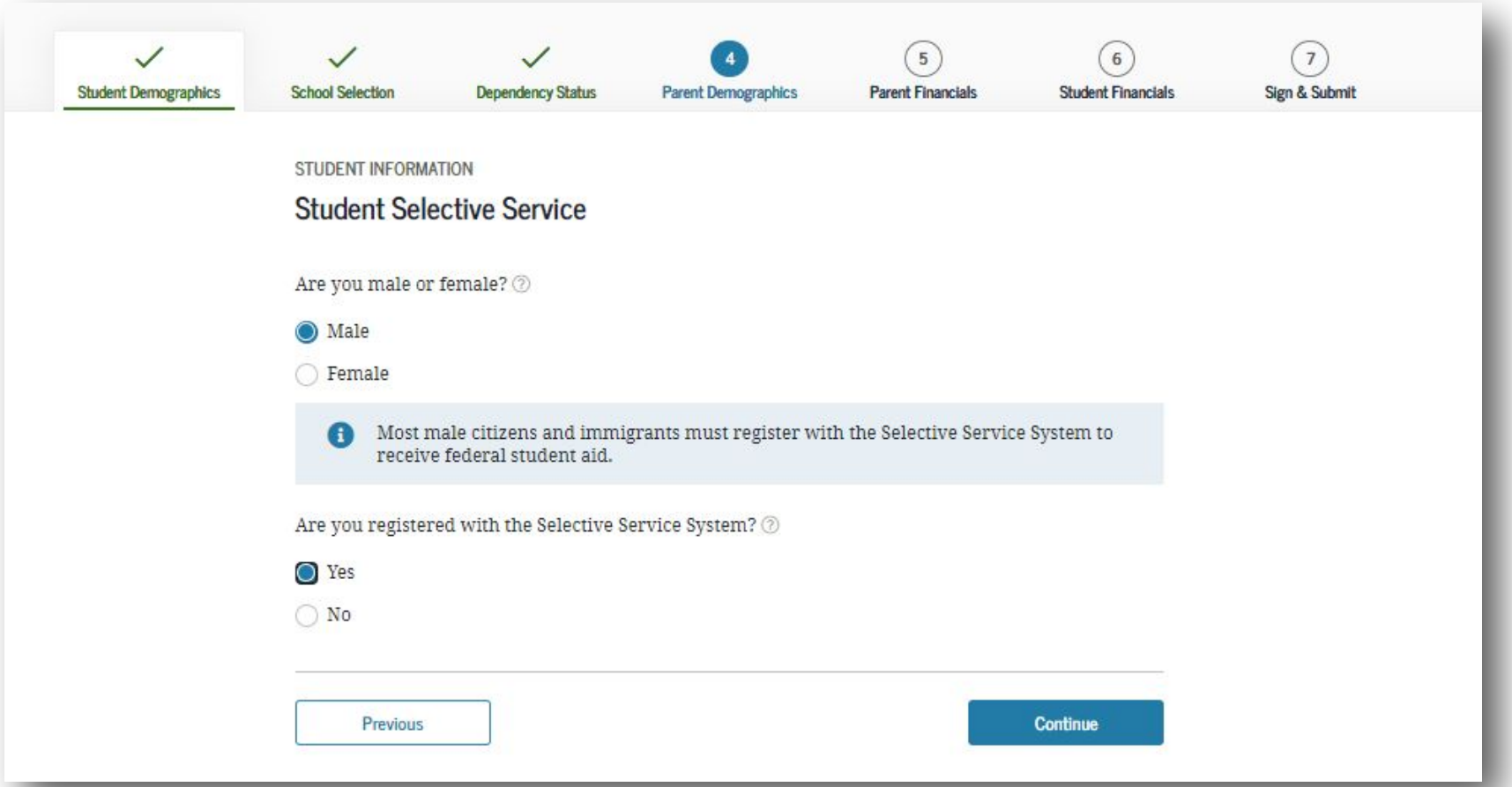
Whose Information Should I Provide?



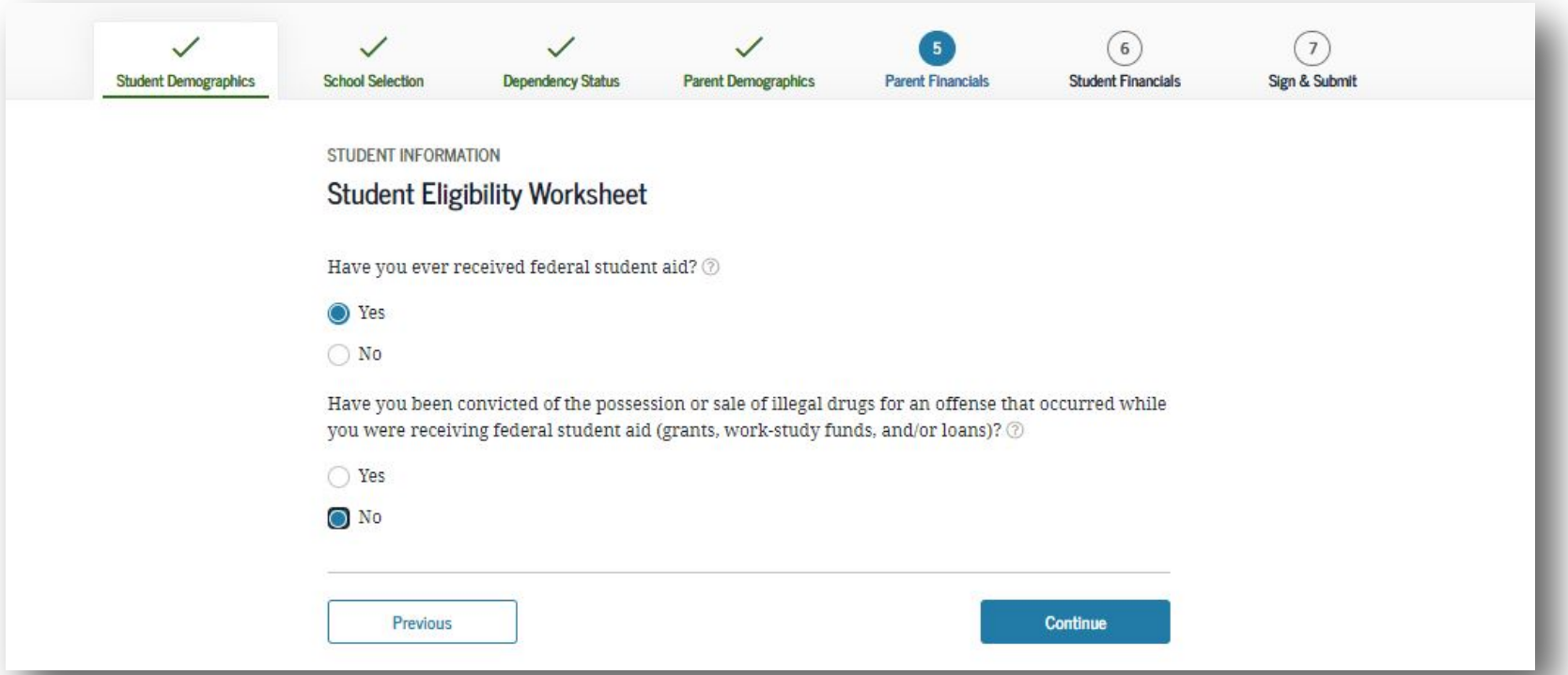
Parent Household Information



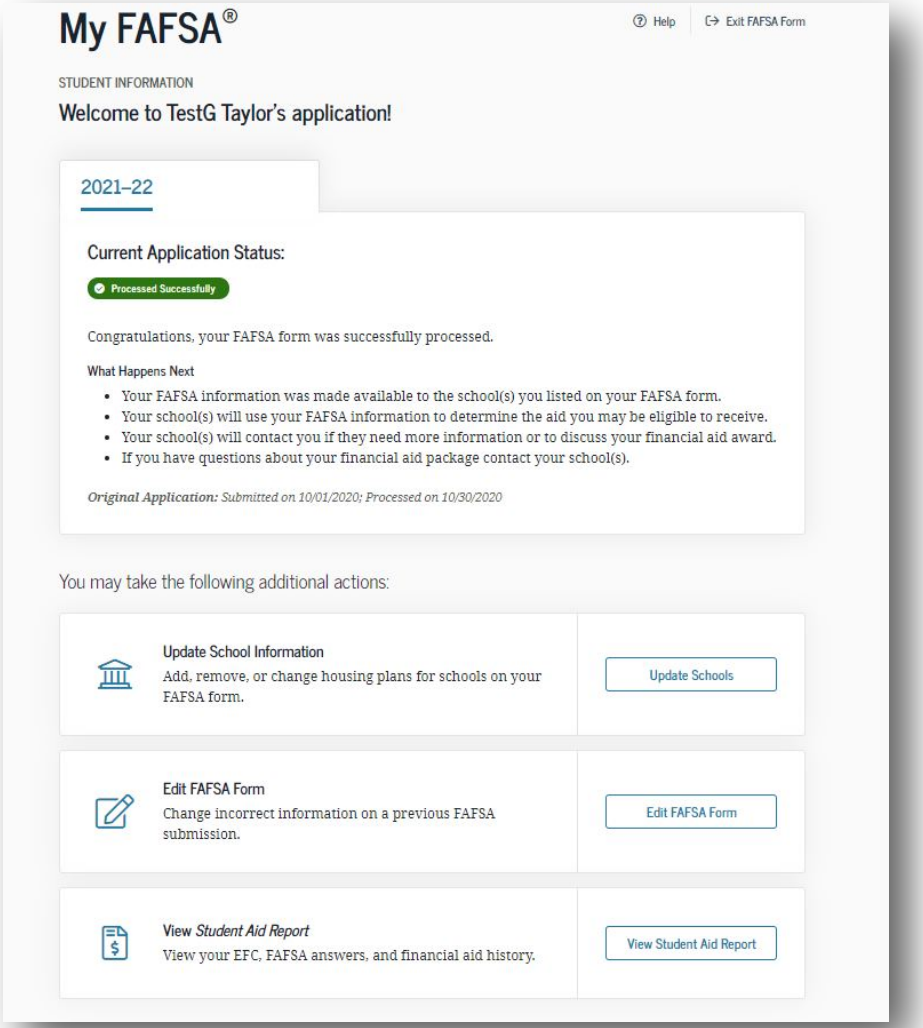
Student Selective Service



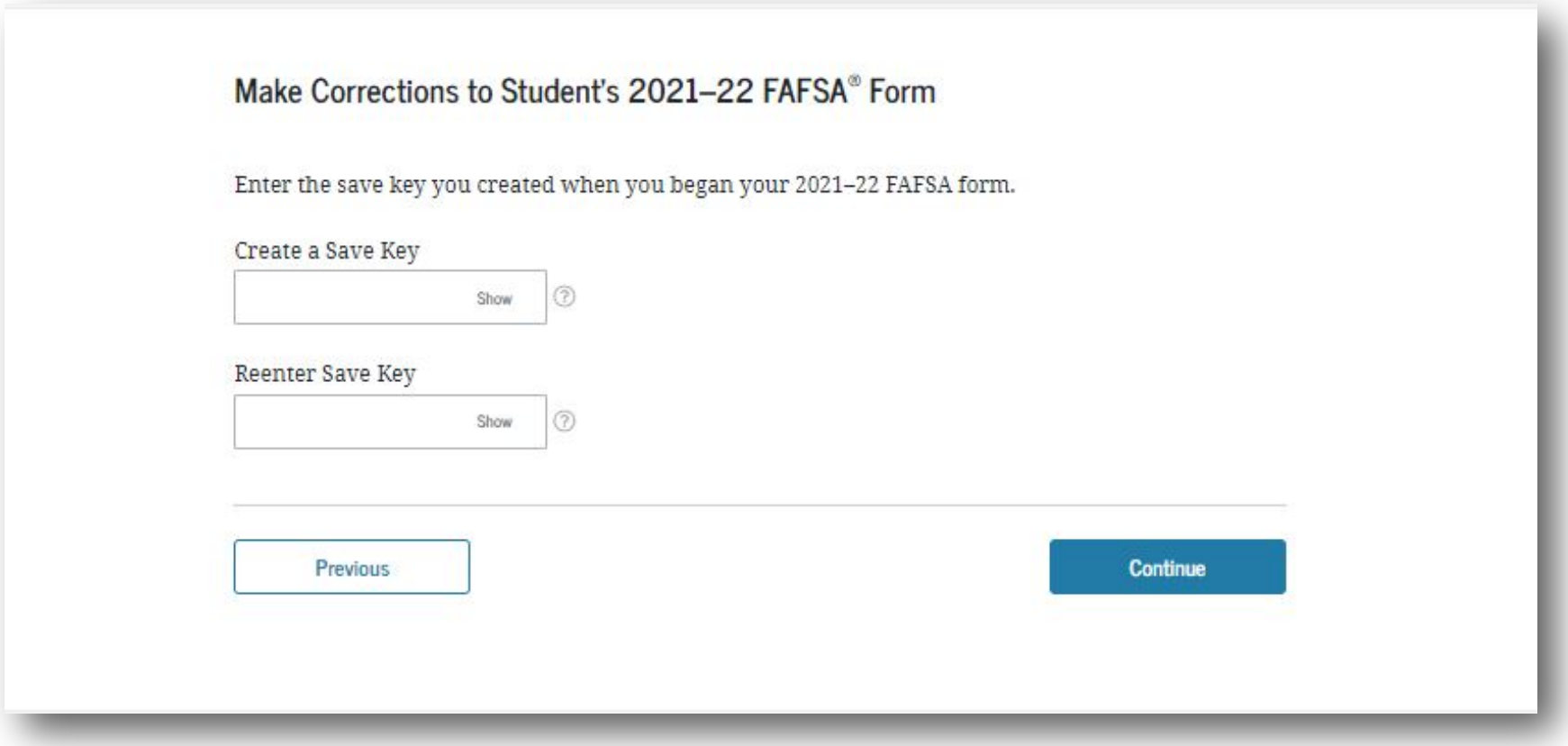
Student Eligibility Worksheet



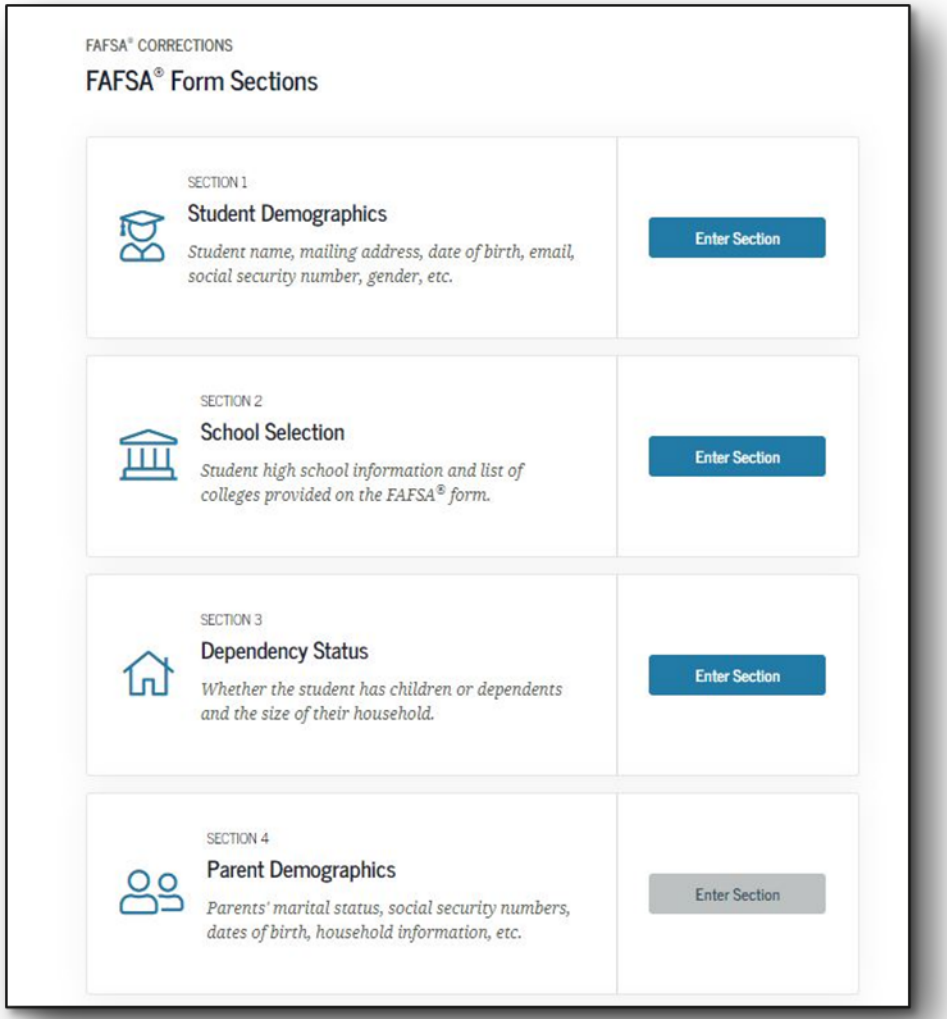
FAFSA Corrections

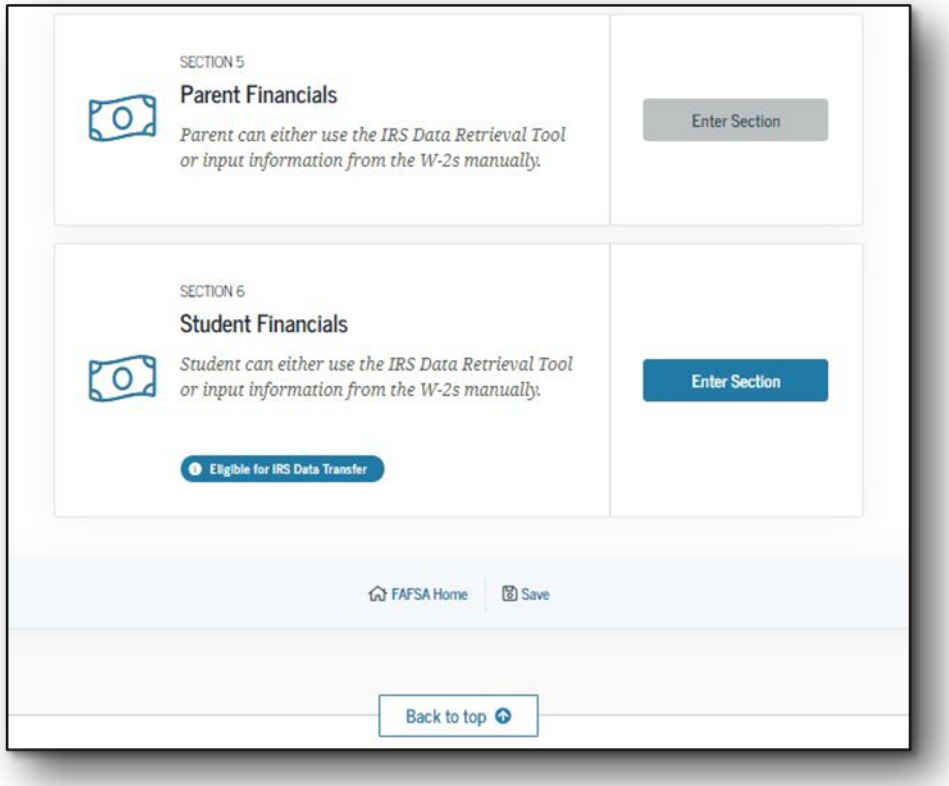


Make Corrections

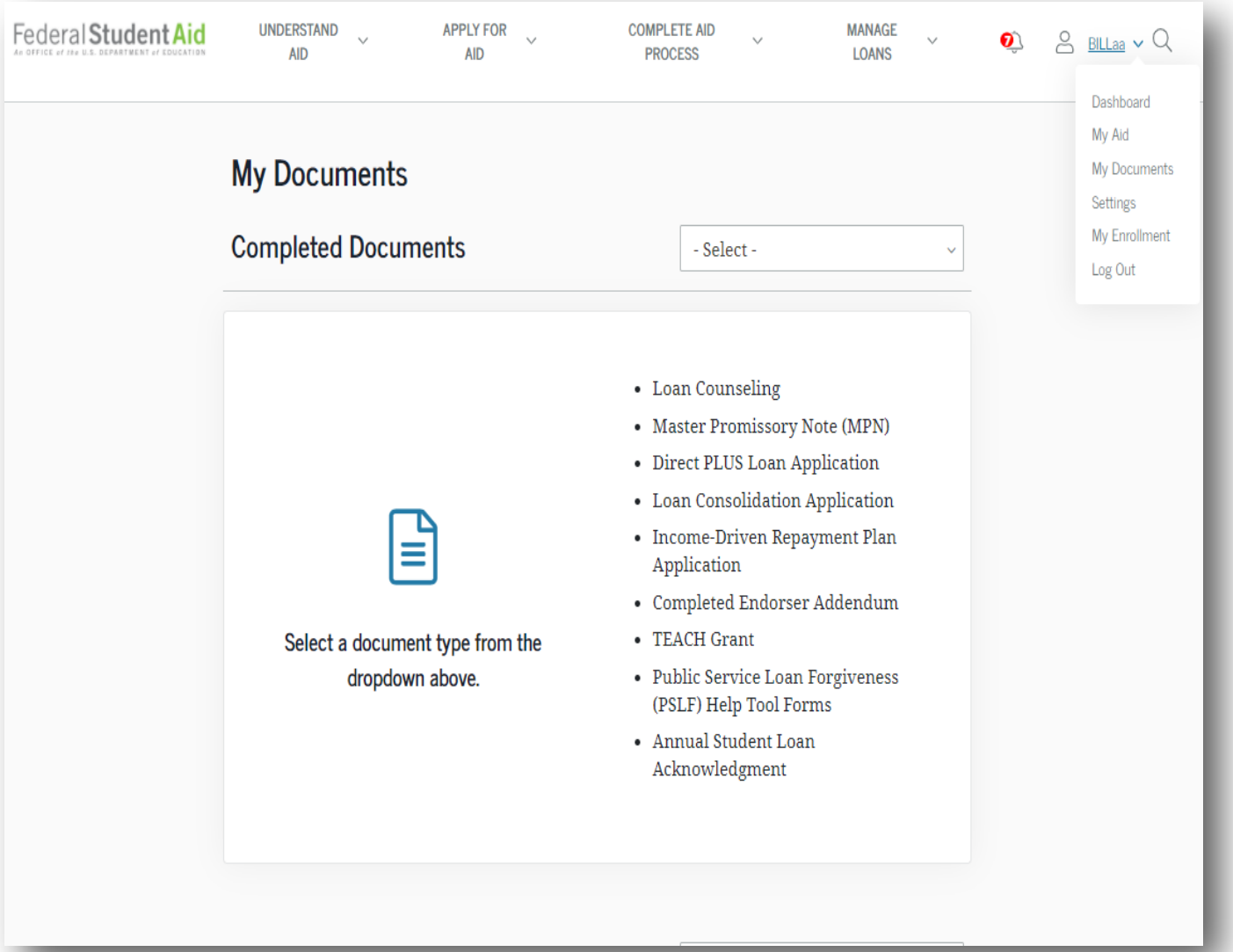


FAFSA Form Sections

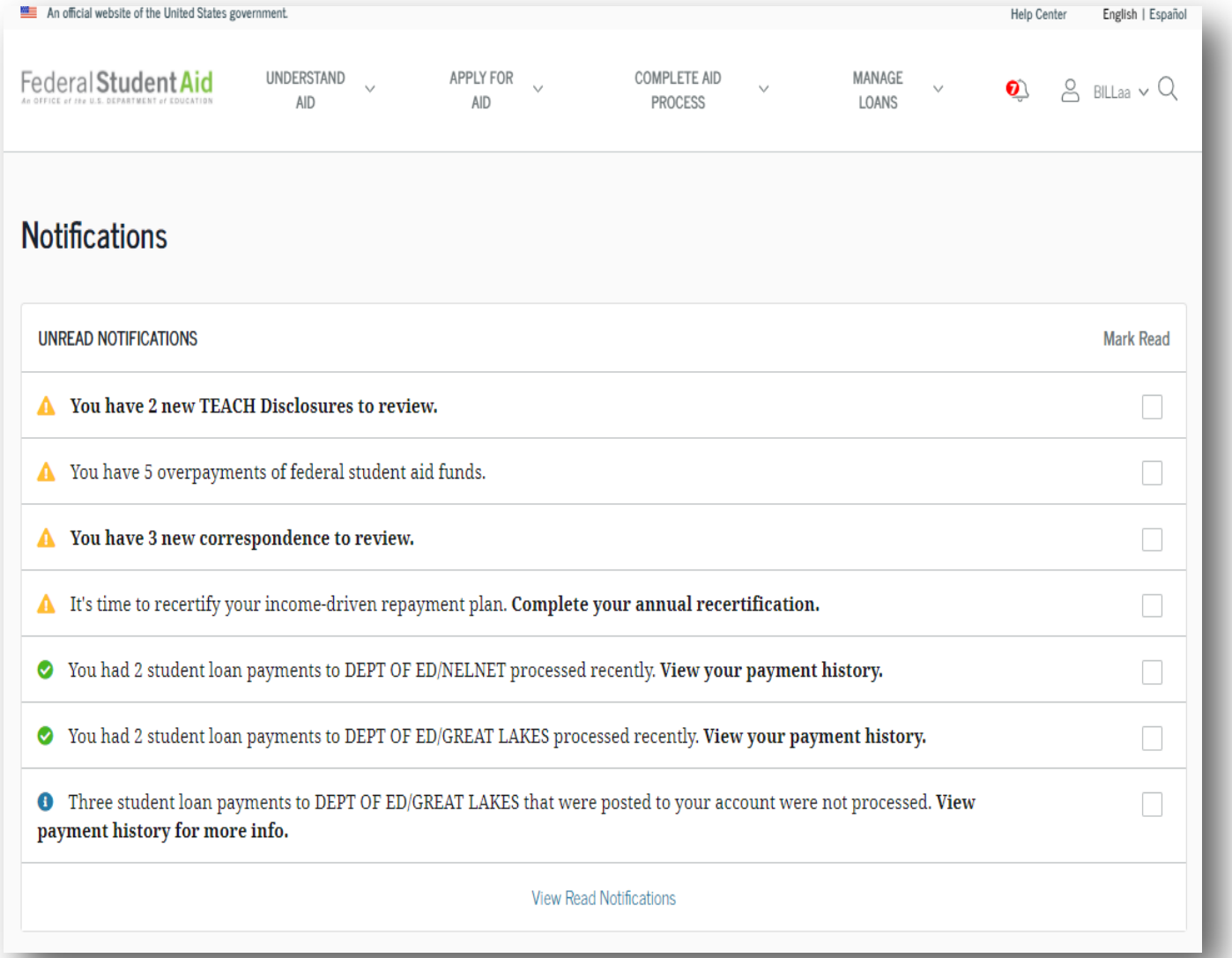




My Documents

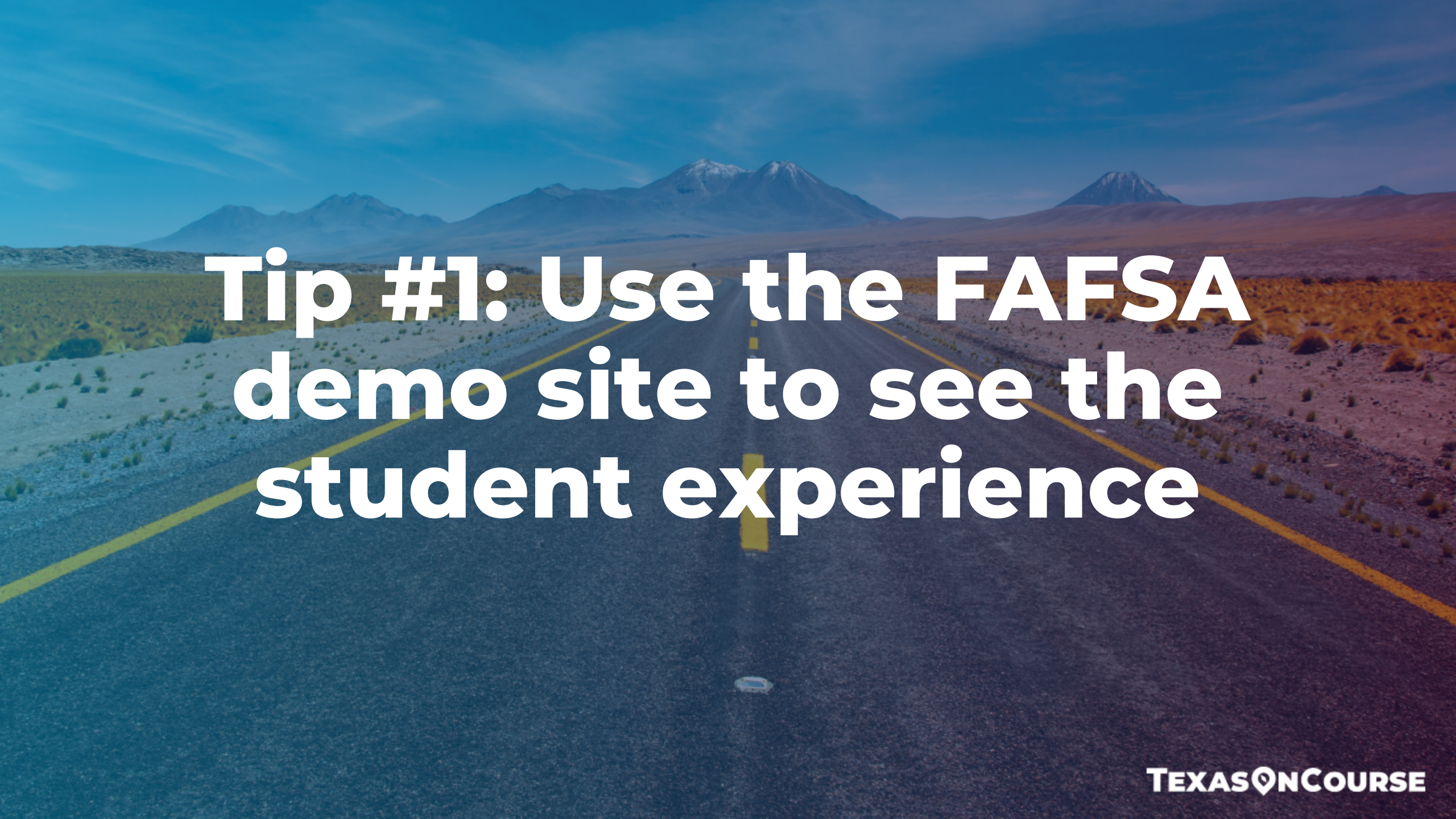


Notifications



EFC Future Update

Replacing the EFC with the Student Aid Index (SAI)
*Expected launch: 2023–24


Tip #1: Use the FAFSA demo site to see the student experience
TEXASONCOURSE

FAFSA Demo Site

Preloaded Test Data

2022-2023 Renewal FAFSAs

Test Case	SSN	Last Name	First Name	DOB	FSA ID Username	FSA ID Password	Dependency Model
1	966-12-1001	Lastnamerapp	Susan	11021986	renewal81	Renewapp81	Independent
2	966-12-1002	Lastnamerapp	Brian	11022003	renewal82	Renewapp82	Independent
3	966-12-1003	Lastnamerapp	Maxine	11022003	renewal83	Renewapp83	Independent
4	966-12-1004	Lastnamerapp	Abe	11022003	renewal84	Renewapp84	Independent
5	966-12-1005	Lastnamerapp	Judith	11022003	renewal85	Renewapp85	Independent
6	966-12-1006	Lastnamerapp	Harvey	04192003	renewal86	Renewapp86	Dependent
7	966-12-1007	Lastnamerapp	Larry	04192003	renewal87	Renewapp87	Dependent
8	966-12-1008	Lastnamerapp	Val	04192003	renewal88	Renewapp88	Dependent
9	966-12-1009	Lastnamerapp	Helen	04192003	renewal89	Renewapp89	Dependent
10	966-12-1010	Lastnamerapp	John	04192003	renewal90	Renewapp90	Dependent

fafsademo.test.ed.gov

Tip #2: Use the ApplyTexas Counselor Suite to track data

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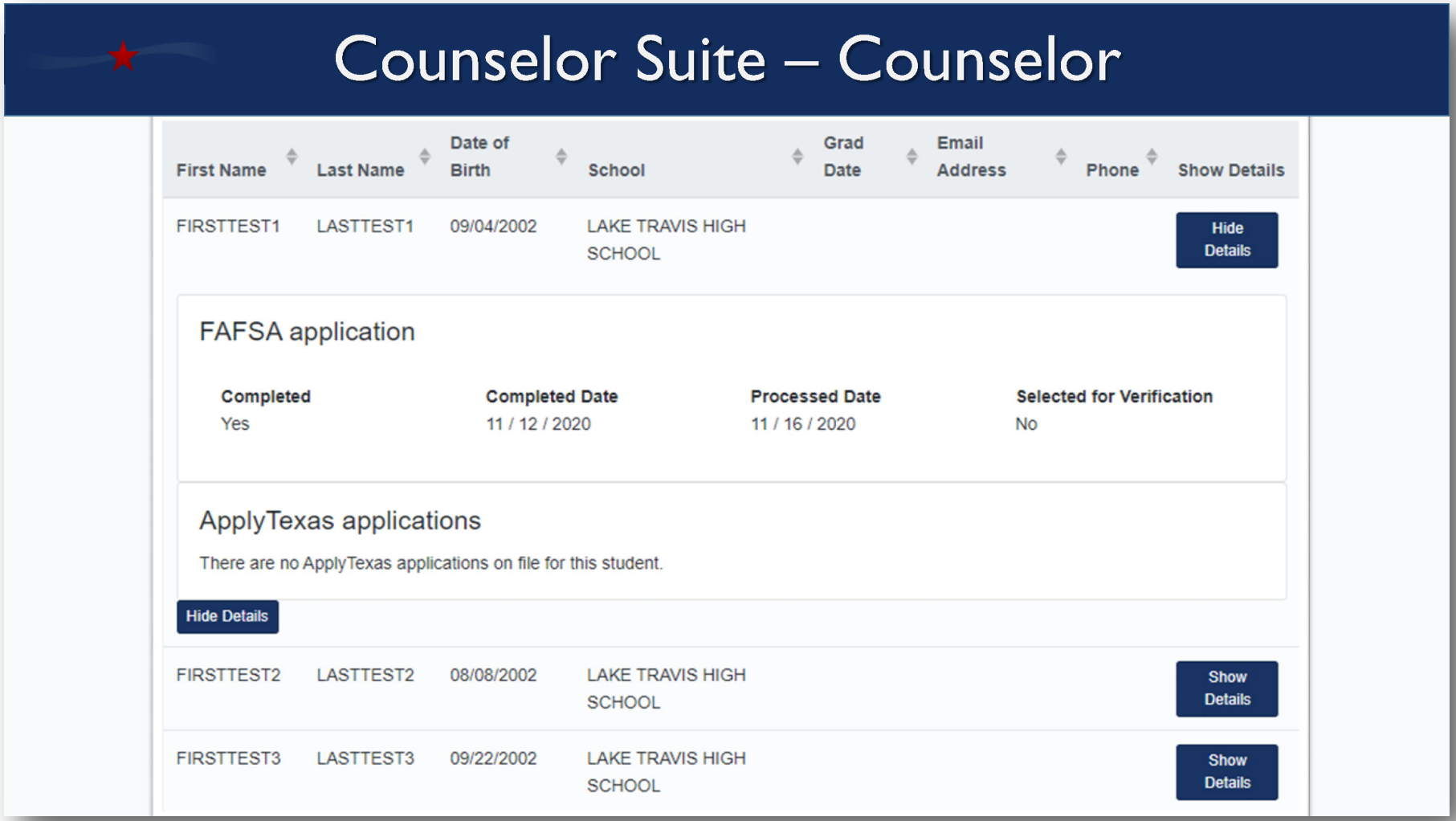
Counselor Suite Preview



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State Financial Aid - TASFA

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What are some common issues you face when completing a TASFA?

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What is the TASFA?

Texas Application for State Financial Aid

Available **October 1**

State priority deadline of **January 15**

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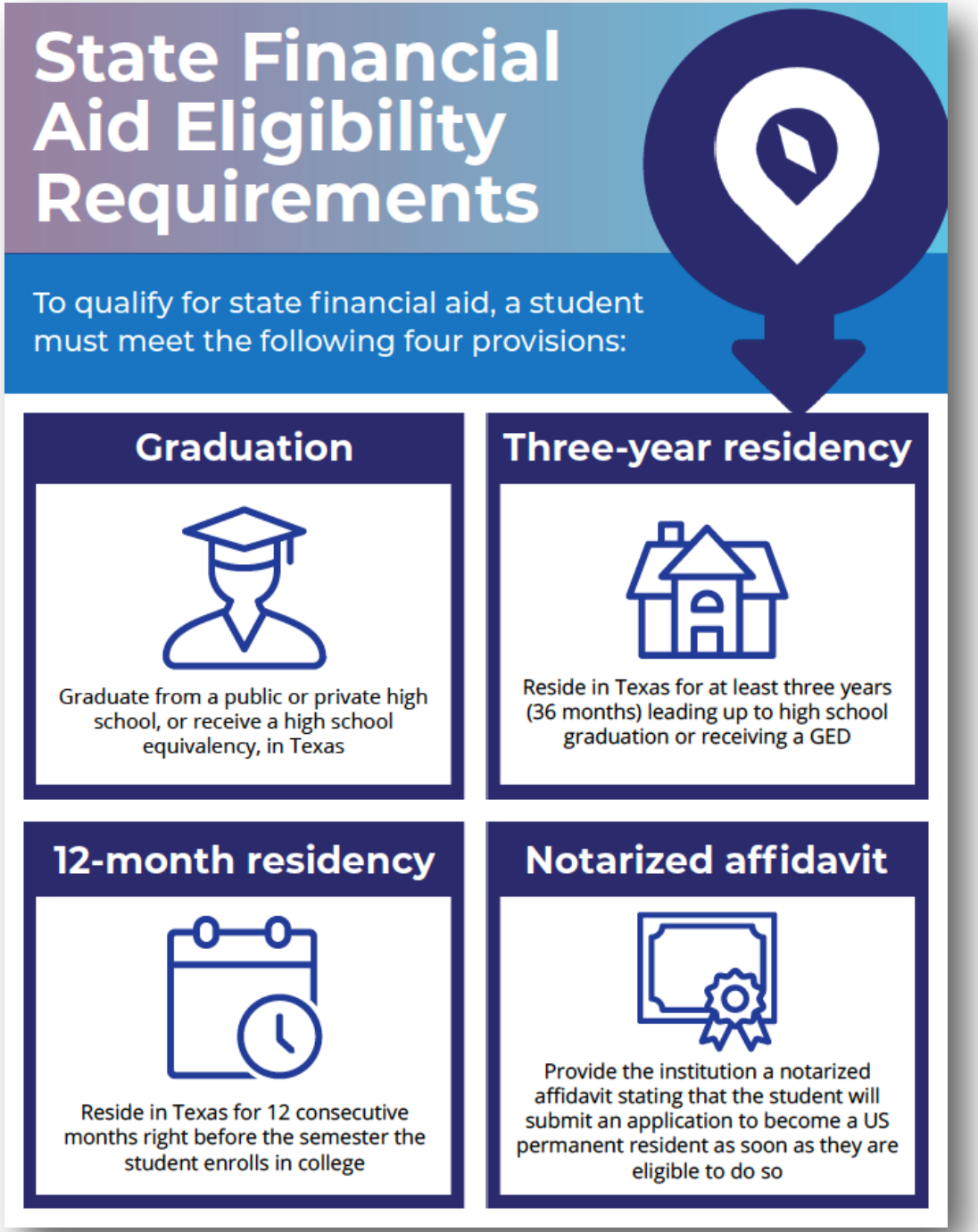
Eligibility Requirements

Who should complete a TASFA:

- Students classified as Texas residents who are not eligible to apply for federal student aid using the FAFSA

Eligibility to qualify for state aid:

- See infographic



Gathering the Right Documentation

Additional materials may be requested by the college:

- Notarized Affidavit of Intent to Become a Permanent Resident
- Copies of IRS Tax Return, W-2 forms, and other income records
- Tax filers: IRS Tax Return Transcript
- Non-tax filers: verification of non-filing letter from IRS or other signed statement
- Males: Proof of Selective Service registration

Tip #1: Check each institution's requirements!
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TASFA Updates

Electronic TASFA

*Expected launch: October 2022

2022–23 paper TASFA

*Available online by Oct 1

Selective Service questions

*Still required

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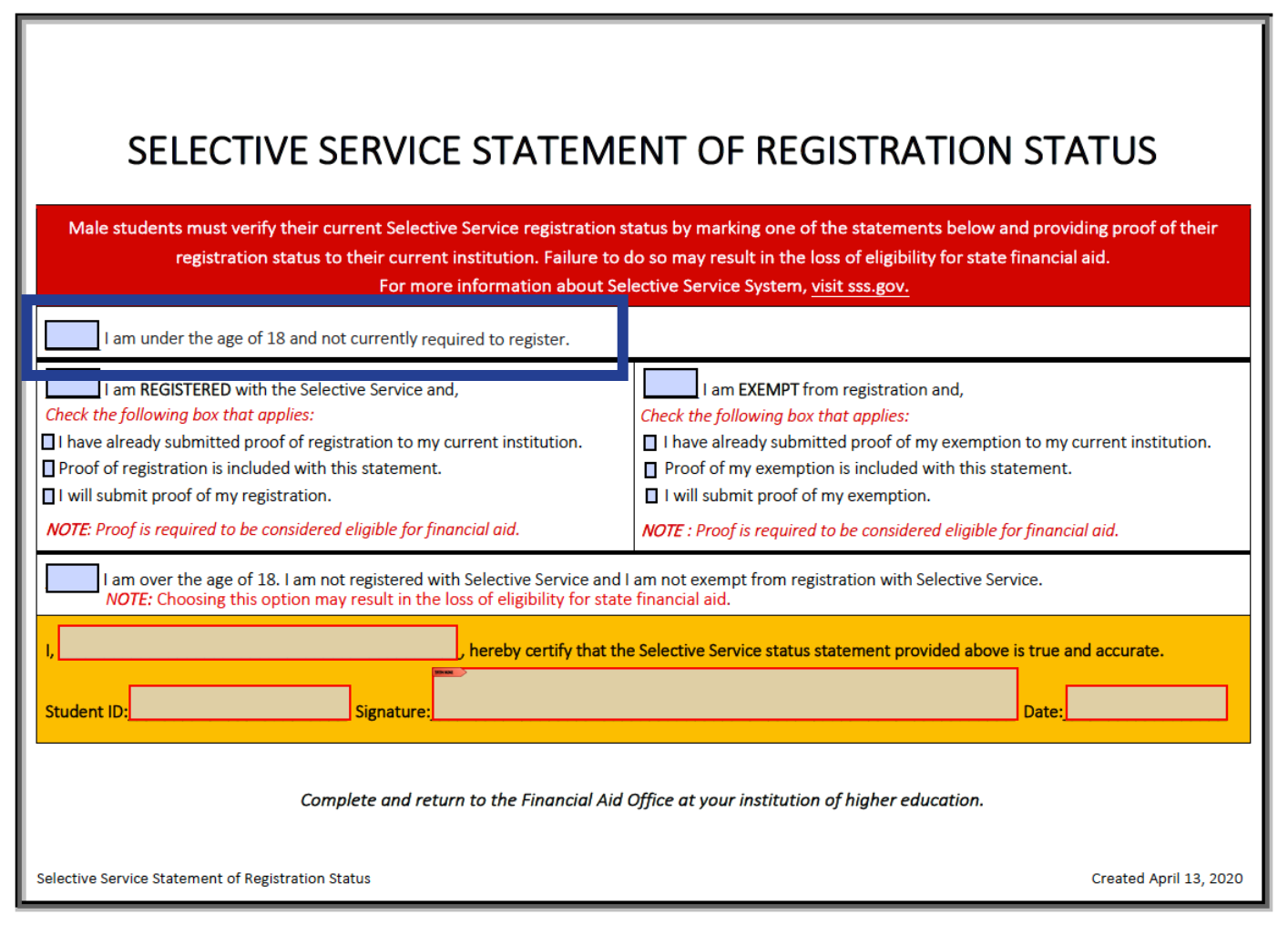
Note: Students Under 18



SELECTIVE SERVICE STATEMENT OF REGISTRATION STATUS

Male students must verify their current Selective Service registration status by marking one of the statements below and providing proof of their registration status to their current institution. Failure to do so may result in the loss of eligibility for state financial aid.
For more information about Selective Service System, visit sss.gov.

☐ I am under the age of 18 and not currently required to register.

☐ I am **REGISTERED** with the Selective Service and,

Check the following box that applies:

- ☐ I have already submitted proof of registration to my current institution.
- ☐ Proof of registration is included with this statement.
- ☐ I will submit proof of my registration.

***NOTE**: Proof is required to be considered eligible for financial aid.*

☐ I am **EXEMPT** from registration and,

Check the following box that applies:

- ☐ I have already submitted proof of my exemption to my current institution.
- ☐ Proof of my exemption is included with this statement.
- ☐ I will submit proof of my exemption.

***NOTE** : Proof is required to be considered eligible for financial aid.*

☐ I am over the age of 18. I am not registered with Selective Service and I am not exempt from registration with Selective Service.
NOTE: Choosing this option may result in the loss of eligibility for state financial aid.

I, _____, hereby certify that the Selective Service status statement provided above is true and accurate.

Student ID: _____ Signature: _____ Date: _____

Complete and return to the Financial Aid Office at your institution of higher education.

Selective Service Statement of Registration Status — Created April 13, 2020

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Tip #2: Have Selective Service registration forms available at financial aid events
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Resource Spotlight

Financial aid graduation requirement website

Our Response

- Texas OnCourse partnered with TEA to create a website that can support a variety of stakeholders in managing this new requirement

Counselors and advisers

Community partners

Families

Students

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Inside Each Webpage

An explanation of the new graduation requirement

Tools and resources that each audience can leverage

Tips and advice **that** pull in best practices and simplify the financial aid process

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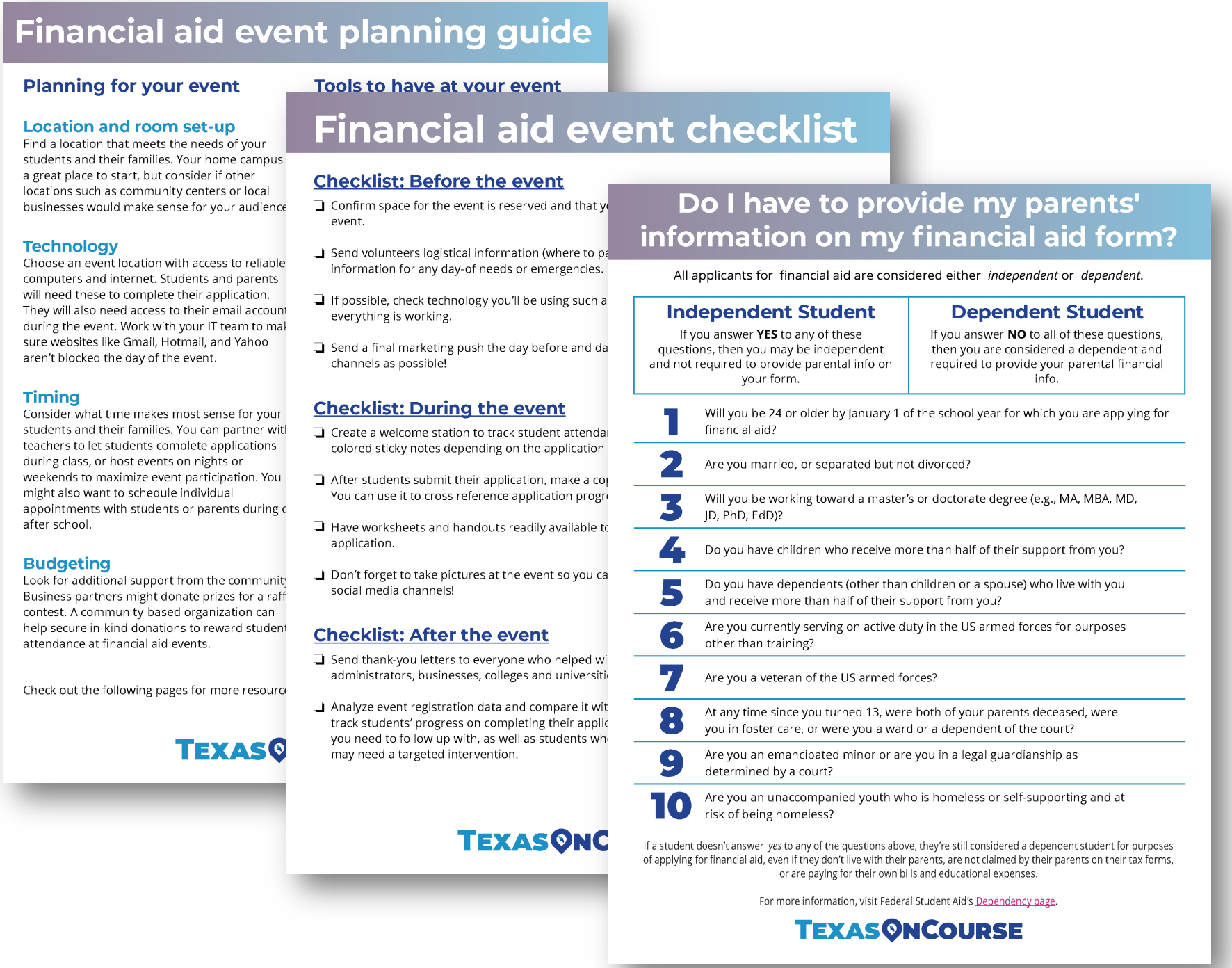
Printable Resources



Financial aid event planning guide

Planning for your event

Location and room set-up
Find a location that meets the needs of your students and their families. Your home campus a great place to start, but consider if other locations such as community centers or local businesses would make sense for your audience

Technology
Choose an event location with access to reliable computers and internet. Students and parents will need these to complete their application. They will also need access to their email account during the event. Work with your IT team to mak sure websites like Gmail, Hotmail, and Yahoo aren't blocked the day of the event.

Timing
Consider what time makes most sense for your students and their families. You can partner with teachers to let students complete applications during class, or host events on nights or weekends to maximize event participation. You might also want to schedule individual appointments with students or parents during c after school.

Budgeting
Look for additional support from the community Business partners might donate prizes for a raff contest. A community-based organization can help secure in-kind donations to reward student attendance at financial aid events.

Check out the following pages for more resourc

TEXAS

Tools to have at your event

Financial aid event checklist

Checklist: Before the event
- ❑ Confirm space for the event is reserved and that y event.
- ❑ Send volunteers logistical information (where to pa information for any day-of needs or emergencies.
- ❑ If possible, check technology you'll be using such a everything is working.
- ❑ Send a final marketing push the day before and da channels as possible!

Checklist: During the event
- ❑ Create a welcome station to track student attenda colored sticky notes depending on the application
- ❑ After students submit their application, make a co You can use it to cross reference application progr
- ❑ Have worksheets and handouts readily available t application.
- ❑ Don't forget to take pictures at the event so you ca social media channels!

Checklist: After the event
- ❑ Send thank-you letters to everyone who helped wi administrators, businesses, colleges and universiti
- ❑ Analyze event registration data and compare it wit track students' progress on completing their applic you need to follow up with, as well as students wh may need a targeted intervention.

TEXASONC

Do I have to provide my parents' information on my financial aid form?

All applicants for financial aid are considered either *independent* or *dependent*.

Independent Student	Dependent Student
If you answer **YES** to any of these questions, then you may be independent and not required to provide parental info on your form.	If you answer **NO** to all of these questions, then you are considered a dependent and required to provide your parental financial info.

1	Will you be 24 or older by January 1 of the school year for which you are applying for financial aid?
2	Are you married, or separated but not divorced?
3	Will you be working toward a master's or doctorate degree (e.g., MA, MBA, MD, JD, PhD, EdD)?
4	Do you have children who receive more than half of their support from you?
5	Do you have dependents (other than children or a spouse) who live with you and receive more than half of their support from you?
6	Are you currently serving on active duty in the US armed forces for purposes other than training?
7	Are you a veteran of the US armed forces?
8	At any time since you turned 13, were both of your parents deceased, were you in foster care, or were you a ward or a dependent of the court?
9	Are you an emancipated minor or are you in a legal guardianship as determined by a court?
10	Are you an unaccompanied youth who is homeless or self-supporting and at risk of being homeless?

If a student doesn't answer *yes* to any of the questions above, they're still considered a dependent student for purposes of applying for financial aid, even if they don't live with their parents, are not claimed by their parents on their tax forms, or are paying for their own bills and educational expenses.

For more information, visit Federal Student Aid's Dependency page.

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Tips and Advice

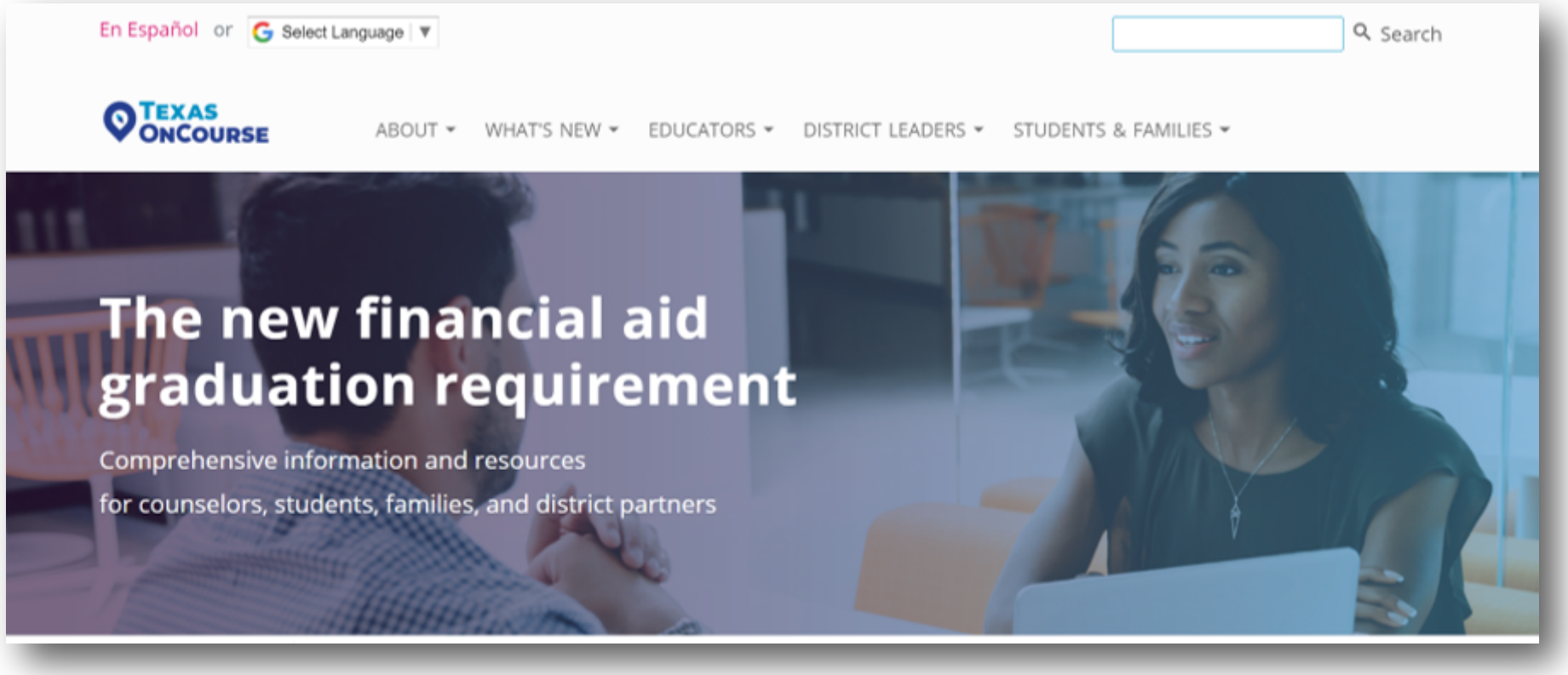
Conduct a needs assessment

To carry out a successful financial aid application completion drive, high schools can't work alone. But what role should a community partner play in supporting district and campus efforts?

To start, conduct a needs assessment. This will show you how to best allocate support to the districts and campuses you work with. Coordinate with school leaders to better understand their current capacity and any gaps in student support. Consider using the following guided questions in your needs assessment:

- Who does the campus or district already partner with?
- What's our organizational niche, and what support are we best positioned to provide?
- What connections to the community do we have that our partnering school or district may not have?
- What resources could we leverage to support our partnering school or district?

Accessing the Resources



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Guidance for Community Partners

Financial Aid Requirement

Download toolkit

Download Option

Additional Questions

Feel free to type your questions in the chat box.

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Next Webinar: CCMR in Your District 2.0
October 12th, 2021 10:00 am
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Thank You
Stay tuned for our email follow-up with all this information.
Take care and stay healthy and safe!
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