



TEXAS HIGHER EDUCATION COORDINATING BOARD

STUDENT SERVICES DIVISION

P. O. Box 12788 Austin, Texas 78711
Located at 1200 East Anderson Lane, Austin, Texas 75752

LOIS P. R. HOLLIS
Assistant Commissioner
for Student Services

MEMO

JANE I. CALDWELL
Director of Grants and
Special Programs

TO: Superintendent of Schools

LESA W. MOLLER
Director of Loan Program
Operations

FROM: Kathryne Ford *Kathryne Ford*
Program Technician for Grants and Special Programs

Telephone:
Austin area:
(512) 427-6340
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DATE: March 20, 2007

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(512) 427-6420

SUBJECT: College Tuition and Partial Fee Exemption for Educational Aides

Web Sites:
www.thechb.state.tx.us
www.hhloans.com
www.collegefortexans.com

Texas Education Code §54.214 authorizes an exemption from tuition and mandatory fees other than class and laboratory fees for individuals who have been employed as full-time educational aides at a public school in Texas for at least one school year during the prior 5 years and who are attending a public institution of higher education in Texas to become certified as a teacher*.

An Individual may apply who

- Has applied for financial aid through the college to be attended, including filing the Free Application for Federal Student Aid or by qualifying on the basis of adjusted gross income;
- Is a Texas resident;
- Has been employed as a full-time educational aide, for at least one of the past five school years; or as a substitute teacher for 180 days of the past five school years preceding the term or semester for which the student is awarded his or her initial exemption;
- Is employed in some capacity by a school district in Texas during the full term for which the student receives the award unless granted a hardship waiver as described in Section 21.1089 of this title (relating to Hardship Provision);
- Enrolls in courses leading to teacher certification;
- Registers for the Selective Service or is exempt from this requirement; and
- Meets academic requirements established by the college or university.

Enclosed are the following: fact sheet about the program, current applications, a sheet regarding how to determine need, rules adopted by the Texas Higher Education Coordinating Board and a list of most frequently asked questions. The enabling legislation is included on our web-site, www.collegefortexans.com. To review a list of Texas public institutions, www.collegefortexans.com/cfb/in/inst.cfm.

* The program is now open to school employees employed in any capacity including substitute teachers.

To get a current Educational Aide Exemption Application, instructions and information, visit our web-site, www.collegefortexans.com, select English, Forms and Applications and Educational Aide Exemption or contact the Texas Higher Education Coordinating Board at (512) 427-6387 (Austin metro) or (800) 242-3062, ext. 6387.

The application has three parts. Part I is to be completed by the applicant; Part II is to be completed by the school district or an appropriate employee at the school for which the applicant is working; Part III is to be completed by the relevant college financial aid office.

As soon as the applicant completes Part I and submits the application to the principal or personnel official at his/her school, Part II should be completed, certifying the student's eligibility and the application should be forwarded to the relevant college financial aid office.

NOTE: We have experienced a few instances in which Part II was completed by the applicants, but was signed by district personnel without a careful examination of the applicant's previous employment as an aide and current employment. Don't let this happen at your district or school. State funds are being awarded on the basis of your certified statement on Part II. Please do not take this responsibility lightly.

The application needs to be completed by the college and submitted to the Coordinating Board before the end of term in which the applicant is to receive the exemption so the sooner you can forward it to the college, the better. Also, the application changes with the academic year, so an applicant will need to contact the Financial Aid office at the institution he/she will attend or the Coordinating Board at (512) 427-6387 (Austin metro) or (800) 242-3062, ext. 6387 to request an updated application.

CALENDAR:

- Summer 2007 applications accepted April 1, 2007 through October 1, 2007
- 2007-08 Fall/Spring applications accepted June 1, 2007 through July 1, 2008 (Spring eligibility is dependent on the applicants' continued employment by their school or school district).
- If **only** applying for Fall 2007, applications will be accepted June 1, 2007 through February 1, 2008.
- If **only** applying for Spring 2008, applications will be accepted November 1, 2007 through July 1, 2008 (Part II of the Spring application cannot be certified by the school district until November 1, 2007).

If an applicant is interested in the Alternative Certification Program, please refer them to the Financial Aid Office at the institution they plan to attend to find out if the institution is receiving formula funding for the hours in which the student plans to enroll. If the student does not plan to attend a Texas public institution, then he/she is not eligible to participate.

Superintendent of Schools

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If an employee participating in our program leaves your school district, you must notify us. He or she has violated one of the requirements for the exemption. Regarding substitute teachers participating in our program, they must accept teaching assignments during the term which they are receiving the exemption. Please notify us if no assignments are accepted.

Spring Rosters will be mailed once a year, on November 1 to the Superintendent of Schools with a response date of December 1. We ask that these rosters be completed and submitted for your employees by the deadline in order for them to receive spring awards. Your employees cannot be approved until the roster is received.

Thank you for your cooperation with this program. Feel free to contact us if you have any questions. The contact person is Kathryn Ford at (512) 427-6457 (Austin metro) or (800) 242-3062, ext. 6457 email Kathryne.Ford@thecb.state.tx.us or JoElla Martinez at email JoElla.Martinez@thecb.state.tx.us.

Enclosures

DETERMINING NEED

Students applying for the Educational Aide Exemption Program, can meet the financial need criterion by either of the following methods:

- (a) Use the federal formulas and calculate need based on the cost of education less expected family contribution (this is the method in the proposed rules that are enclosed), or,
- (b) Qualify based on adjusted gross income (AGI).
 - (1) Single independent students can meet the need requirement if their adjusted gross income is \$28,959 or less. This AGI is for Summer 2007. The AGI cut off for Fall 2007 and Spring 2008 will be provided before June 1, 2007.
 - (2) Married independent students can meet the need requirement if the combined adjusted gross income for the student and his/her spouse is \$57,920 or less. This AGI is for Summer 2007. The AGI cut off for Fall 2007 and Spring 2008 will be provided before June 1, 2007.
 - (3) Dependent students can meet the need requirement if the adjusted gross income for their family is \$57,920 or less. This AGI is for Summer 2007. The AGI cut off for Fall 2007 and Spring 2008 will be provided before June 1, 2007.

If a student qualifies using the adjusted gross income method, the award amount will be the total of the tuition and fees other than class or laboratory fees. If the student qualifies using the federal methodology, the award amount will be the total of the tuition and fees other than class or lab fees or the student's need, whichever is less.

Fact Sheet Fact Sheet Fact Sheet Fact Sheet Fact Sheet Fact Sheet Fact Sheet Fact Sheet

Educational Aide Exemption Program

How Much Is It Worth?

The program exempts eligible students attending public colleges or universities in Texas from the payment of tuition and fees (other than class or laboratory fees) per year of eligibility. Spring term exemptions are conditional upon meeting program requirements in the fall. Summer awards are dependent upon the availability of funds. Individuals who receive awards in one year may apply for awards in subsequent years. The maximum award is tuition and fees (other than class or laboratory fees) or the student's financial need, whichever is less. **This exemption DOES cover remedial or developmental classes.**

Who Can Apply?

An applicant must:

- Be a Texas resident;
- Have applied for financial aid through the college to be attended, including filing the Free Application for Federal Student Aid or by qualifying on the basis of adjusted gross income;
- Have been employed as a full-time educational aide, for at least one of the past five school years, or as a substitute teacher for 180 days of the past five school years preceding the term or semester for which the student is awarded his or her initial exemption;
- Be employed in some capacity by a school district in Texas during the full term for which the student receives the award unless granted a hardship waiver as described in Section 21.1089 of this title (relating to Hardship Provision);
- Enroll in courses leading to teacher certification;
- Register for the Selective Service or be exempt from this requirement; and
- Meet academic requirements established by the college or university.

How Do You Get An Application?

Contact the school district where the educational aide is employed, the financial aid office of the college the aide will attend or log onto our web-site, www.collegefortexans.com, select English, Forms and Applications and Educational Aide Exemption or the Texas Higher Education Coordinating Board at (512) 427-6387 (Austin metro) or (800) 242-3062, ext. 6387.

What Is the Application Process?

- 1) Complete the admissions and financial aid process for your college, including the filing of a Free Application for Federal Student Aid.
- 2) The applicant completes Part I of the Educational Aide application reflecting the academic year he/she is applying and delivers the form to an official of his/her school or school district.
- 3) The school (district) official completes Part II of the form and sends it to the Director of Financial Aid of the college the aide will attend.
- 4) The Financial Aid Office completes Part III and forwards the form to the Texas Higher Education Coordinating Board.
- 5) The Board selects recipients and announces the awards for the fall term.
- 6) In November, the Board sends out rosters to school districts to verify the student's employment in the Spring term, due back to the Board by December 1.
- 7) The Board announces spring awards as soon as verifications from school districts are received.
- 8) March 1, the Board announces whether there will be summer awards by sending out a memorandum to school districts, financial aid offices and current applicants.

* Substitute Teachers who have at least 180 full days of employment as a substitute during the past 5 years and employees serving in any capacity who have met the 1 school year of educational aide experience within the past 5 years may now participate in the program.

Summer 2007 Application for an Educational Aide Exemption

PLEASE READ THE INSTRUCTIONS ON THE BACK TO ACCURATELY COMPLETE THE APPLICATION

DO NOT FAX

PART I TO BE COMPLETED BY APPLICANT (Be sure to complete all questions or application will be rejected):

1. Last Name	First Name	Middle Initial	2. Social Security Number
3. Street Address			4. Telephone Number
City	State	Zip	()

5. College To Be Attended: _____
(If you will be attending more than one college, a separate application must be submitted for each school.)

6. Estimated # College Hours to be taken per term: Summer I 2007 _____ Summer II 2007 _____
(List number of hours per term)

7. Ethnicity (optional) () African American/Black () American Indian or Alaskan Native () Asian or Pacific Islander
() Hispanic or Latino () White/Non Hispanic

8. Check One: FAFSA already filed _____ FAFSA will be filed _____ 2006 Tax Return Attached _____

CERTIFICATION - I hereby certify that I understand I need to meet satisfactory academic progress according to the college's financial aid office. I understand my financial need may change according to the number of hours for which I register. I will enroll in classes leading to teacher certification.

Student Signature _____ Date _____

STOP!! Please forward this application to the Personnel Office of the School District you are employed with.

PART II TO BE COMPLETED BY SCHOOL OR SCHOOL DISTRICT (Be sure to complete all questions or application will be rejected):

- Does the applicant qualify for the awards as: (District representative; initial the proper line).
_____ (a) an educational aide _____ (b) a substitute teacher
- If as an aide, give dates for their employment as an aide (minimum requirement is 1 academic year full-time experience within the past 5 years):
From _____ / _____ / _____ To _____ / _____ / _____ (LESS THAN ONE YEAR, NOT ELIGIBLE)
(Employment doesn't have to be at same school district or in consecutive years (attach a sheet if more space is needed))
- If as a substitute teacher, do you have proof in your files of at least 180 full days of employment as a substitute teacher during the past 5 years?
() Yes () No (NOT ELIGIBLE)
- Will the applicant be employed by your school district during the Fall 2007 term?
() Yes () No (NOT ELIGIBLE)

CERTIFICATION - I have checked employment records and hereby certify that the applicant meets program employment requirements.

School District	County District Number:	Date
(ISSUED BY TEXAS EDUCATION AGENCY)		
Signature of AUTHORIZED PERSONNEL OFFICIAL only	Title	Telephone No.
		()

STOP!! Please forward this application to the Financial Aid Office of the College

PART III TO BE FILLED OUT BY FINANCIAL AID OFFICE (Be sure to complete all questions or application will be rejected):

1. Texas Resident? () Yes () No (NOT ELIGIBLE) 2. () Single Independent () Single Dependent () Married

3a. Financial Need If filed FAFSA \$ _____ If Need <= 0, indicate No
(Cost Less Estimated Family Contribution and Gift Aid) Need and submit to CB

3b. AGI If qualifying based on the Adjusted Gross Income \$ _____

4. Estimated awards through this exemption: Summer I 2007 _____ Summer II 2007 _____

CERTIFICATION - I hereby certify that I have applied or caused to be applied all rules and regulations regarding this program in determining student eligibility and recommending this student for the award indicated above. I will maintain the necessary records to justify this award in case of a program audit.

Institution Name	6-digit Fice Code	Date
Signature of Director of Financial Aid	Printed or Typed Name	Telephone No.
		()

**Instructions for Completing the Summer 2007 Application
for an Educational Aide Exemption**

THIS APPLICATION MAY BE SUBMITTED APRIL 1, 2007 THROUGH OCTOBER 1, 2007

Part I must be completed by the applicant; Part II by the Personnel Director of the school district or school by which the applicant but paid the amounts is employed; Part III by the Financial Aid Office of the school the applicant is/will be attending. Keep in mind that the application changes each academic year and summer term. Applications with the wrong year will be rejected.

Questions Instructions

PART I

- | | |
|-----|--|
| 1-4 | Self-explanatory |
| 5 | List the college you plan/are attending. If you will be attending more than one college, a separate application must be submitted for each school. |
| 6 | Give the estimated number of college hours you are to be taking. Be sure to list the number per term. Keep in mind that these are just estimates and if you take fewer or more hours than you state, your financial need will change accordingly as will the amount you receive for both fall and spring through this program. |
| 7 | This is not a required item. Ethnic origin will not be used as a selection criterion. It is collected purely for statistical purposes. |
| 8 | Please check with your institution to find out whether or not the FAFSA is required. If you have already filed a FAFSA (Free Application for Federal Student Aid), make sure it is for the academic year you are applying. The adjusted gross income method requires you to attach your 2006 Tax Return and eligibility will be based on your adjusted gross income. If you a single dependent student you must supply your family's income tax. If you are married, eligibility is based on the student and spouses income. |

Certification Be sure to sign and date the application. DO NOT COMPLETE ANY SECTION OF PART II.

PART II

- | | |
|---|--|
| 1 | Be sure and check school/district records before completing this section. The student should <u>NOT</u> complete this part. Is the applicant an educational aide or a substitute teacher in your school district? Initial the proper line. |
| 2 | Give the dates of employment the educational aide has been working for your district or other districts. List employment dates with another district separately. For the student to qualify dates must add up to at least 1 school year of full-time experience as an educational aide during the 5 years preceding the term or semester for which the student is awarded his/her initial exemption. |
| 3 | The substitute teacher must provide documentation of the 180 days full service in the past 5 years. School District will need to keep documentation on file. |
| 4 | The applicant must be employed by your school or school district during the full term for which he/she is receiving this exemption unless granted a hardship waiver. |

Certification Person certifying application must be authorized to sign personnel actions. Please be sure to include your 6-digit county district number (example 123-456). This is the number that was issued to your school district by the Texas Education Agency, TEA.

PART III

- | | |
|----|--|
| 1 | Use your institution's residency classification. Remember, however, that to be eligible the student must be a Texas resident, not simply someone eligible to pay the Texas resident tuition rates. In general, to be a Texas resident a student must have been gainfully employed in the State of Texas for the 12 months prior to enrolling in the institution. If the student is claimed as a dependent for income tax purposes by his or parents, the parents must have resided in the state for the 12 months prior to the student's enrollment. |
| 2 | Indicate the student's marital status. If the student is claimed on parent's income tax, the student is classified as a single dependent. If the parents do not claim the student, the student is classified as a single independent. |
| 3a | Give the student's financial need for time period he/she is applying. This is the relevant time period's cost of attendance minus any estimated family contribution and/or gift aid. |
| 3b | If the student qualifies based on his/her adjusted gross income (using his/her most recent income tax form), please indicate so in the space provided and leave the other blank. |
| | If the student shows no financial need based on either of the above, indicate 0 need, based on FAFSA and AGI and submit the application to the Coordinating Board. |
| | The program maximum is equal to the student's tuition and fee charges excluding class and laboratory fees. If the student is qualifying based on their adjusted gross income, their award amount will equal to but not exceed the program maximum. |
| 4 | Self-explanatory |

Certification Please be sure to include your institution's 6-digit fice code and telephone number.

2007-08 Application for an Educational Aide Exemption

PLEASE READ THE INSTRUCTIONS ON THE BACK TO ACCURATELY COMPLETE THE APPLICATION

DO NOT FAX

PART I TO BE COMPLETED BY APPLICANT (Be sure to complete all questions or application will be rejected):

1. Last Name	First Name	Middle Initial	2. Social Security Number
3. Street Address			4. Telephone Number
City	State	Zip	()

5. College To Be Attended: _____
(If you will be attending more than one college, a separate application must be submitted for each school.)

6. Estimated # College Hours to be taken per term: _____ Fall 2007 _____ Spring 2008 _____
(List number of hours per term)

7. Ethnicity (optional) () African American/Black () American Indian or Alaskan Native () Asian or Pacific Islander
() Hispanic or Latino () White/Non Hispanic

8. Check One: FAFSA already filed _____ FAFSA will be filed _____ 2006 Tax Return Attached _____

CERTIFICATION - I hereby certify that I understand I need to meet satisfactory academic progress according to the college's financial aid office. I understand my financial need may change according to the number of hours for which I register. I will enroll in classes leading to teacher certification.

Student Signature _____ Date _____

STOP!! Please forward this application to the Personnel Office of the School District you are employed with.

PART II TO BE COMPLETED BY SCHOOL OR SCHOOL DISTRICT (Be sure to complete all questions or application will be rejected):

1. Does the applicant qualify for the awards as: (District representative; Initial the proper line).

_____ (a) an educational aide _____ (b) a substitute teacher

2. If as an aide, give dates for their employment as an aide (minimum requirement is 1 academic year full-time experience within the past 5 years):
From _____ / _____ / _____ To _____ / _____ / _____ (LESS THAN ONE YEAR, NOT ELIGIBLE)
(Employment doesn't have to be at same school district or in consecutive years (attach a sheet if more space is needed))

3. If as a substitute teacher, do you have proof in your files of at least 180 full days of employment as a substitute teacher during the past 5 years?
() Yes () No (NOT ELIGIBLE)

4. Will the applicant be employed by your school district during the Fall 2007 term?
() Yes () No (NOT ELIGIBLE)

CERTIFICATION - I have checked employment records and hereby certify that the applicant meets program employment requirements.

School District	County District Number:	Date
(ISSUED BY TEXAS EDUCATION AGENCY)		
Signature of AUTHORIZED PERSONNEL OFFICIAL only	Title	Telephone No.
		()

STOP!! Please forward this application to the Financial Aid Office of the College

PART III TO BE FILLED OUT BY FINANCIAL AID OFFICE (Be sure to complete all questions or application will be rejected):

1. Texas Resident? () Yes () No (NOT ELIGIBLE) 2. () Single Independent () Single Dependent () Married

3a. Financial Need If filed FAFSA \$ _____ If Need <= 0, indicate No
(Cost Less Estimated Family Contribution and Gift Aid) Need and submit to CB

3b. AGI if qualifying based on the Adjusted Gross Income \$ _____

4. Estimated awards through this exemption: _____ Fall 2007 _____ Spring 2008 _____

CERTIFICATION - I hereby certify that I have applied or caused to be applied all rules and regulations regarding this program in determining student eligibility and recommending this student for the award indicated above. I will maintain the necessary records to justify this award in case of a program audit.

Institution Name	6-digit Fice Code	Date
Signature of Director of Financial Aid	Printed or Typed Name	Telephone No.
		()

**Instructions for Completing the 2007-08 Application
for an Educational Aide Exemption**

**THIS APPLICATION MAY BE SUBMITTED JUNE 1, 2007 THROUGH JULY 1, 2008
IF APPLYING FOR FALL 2007 ONLY, YOU MAY SUBMIT JUNE 1, 2007 THROUGH FEBRUARY 1, 2008
IF APPLYING FOR SPRING 2008 ONLY, YOU MAY SUBMIT NOVEMBER 1, 2007 THROUGH JULY 1, 2008**

Part I must be completed by the applicant; Part II by the Personnel Director or other appropriate office of the school district or school by which the applicant is employed; Part III by the Financial Aid Office of the school the applicant is/will be attending. Keep in mind that the application changes each academic year and summer term. Applications with the wrong year will be rejected.

Questions Instructions

PART I

- 1-4 Self-explanatory
- 5 List the college you plan/are attending. If you will be attending more than one college, a separate application must be submitted for each school.
- 6 Give the estimated number of college hours you are to be taking. Be sure to list the number per term. Keep in mind that these are just estimates and if you take fewer or more hours than you state, your financial need will change accordingly as will the amount you receive for both fall and spring through this program.
- 7 This is not a required item. Ethnic origin will not be used as a selection criterion. It is collected purely for statistical purposes.
- 8 Please check with your institution to find out whether or not the FAFSA is required. If you have already filed a FAFSA (Free Application for Federal Student Aid), make sure it is for the academic year you are applying. The adjusted gross income method requires you to attach your 2006 Tax Return and eligibility will be based on your adjusted gross income. If you a single dependent student you must supply your family's income tax. If you are married, eligibility is based on the student and spouses income.

Certification Be sure to sign and date the application. DO NOT COMPLETE ANY SECTION OF PART II.

PART II

- 1 Be sure and check school/district records before completing this section. The student should NOT complete this part. Is the applicant an educational aide or a substitute teacher in your school district? Initial the proper line.
- 2 Give the dates of employment the educational aide has been working for your district or other districts. List employment dates with another district separately. For the student to qualify dates must add up to at least 1 school year of experience as an educational aide during the 5 years preceding the term or semester for which the student is awarded his/her initial exemption.
- 3 The substitute teacher must provide documentation of the 180 days full service in the past 5 years. School District will need to keep documentation on file.
- 4 The applicant must be employed by your school or school district during the full term for which he/she is receiving this exemption unless granted a hardship waiver.

Certification Person certifying application must be authorized to sign personnel actions. Please be sure to include your 6-digit county district number (example 123-456). This is the number that was issued to your school district by the Texas Education Agency, TEA.

PART III

- 1 Use your institution's residency classification. Remember, however, that to be eligible the student must be a Texas resident, not simply someone eligible to pay the Texas resident tuition rates. In general, to be a Texas resident a student must have been gainfully employed in the State of Texas for the 12 months prior to enrolling in the institution. If the student is claimed as a dependent for income tax purposes by his or parents, the parents must have resided in the state for the 12 months prior to the student's enrollment.
- 2 Indicate the student's marital status. If the student is claimed on parent's income tax, the student is classified as a single dependent. If the parents do not claim the student, the student is classified as a single independent.
- 3a Give the student's financial need for time period he/she is applying. This is the relevant time period's cost of attendance minus any estimated family contribution and/or gift aid.
- 3b If the student qualifies based on his/her adjusted gross income (using his/her most recent income tax form), please indicate so in the space provided and leave the other blank.
- If the student shows no financial need based on either of the above, indicate 0 need, based on FAFSA and AGI and submit the application to the Coordinating Board.
- The program maximum is equal to the student's tuition and fee charges excluding class and laboratory fees. If the student is qualifying based on their adjusted gross income, their award amount will equal to but not exceed the program maximum.
- 4 Self-explanatory

Certification Please be sure to include your institution's 6-digit fice code and telephone number.

CHAPTER 21. STUDENT SERVICES

SUBCHAPTER II. EDUCATIONAL AIDE EXEMPTION PROGRAM

Section

- 21.1080. Authority and Purpose.
- 21.1081. Definitions.
- 21.1082. Institutions.
- 21.1083. Eligible Students.
- 21.1084. The Application and Awarding Process.
- 21.1085. Special Considerations if Funding is Limited.
- 21.1086. Award Amounts and Processing Cycle.
- 21.1087. Reimbursements.
- 21.1088. Exemption from Student Teaching.
- 21.1089. Hardship Provisions.
- 21.1090. Dissemination of Information and Rules.

- 21.1080. Authority and Purpose.

(a) Authority. Authority for this subchapter is provided in the Texas Education Code, Chapter 54, Subchapter B, Tuition Rates. These rules establish procedures to administer the subchapter as prescribed in the Texas Education Code, Section 54.214, relating to an exemption for educational aides.

(b) Purpose. The purpose of the Educational Aide Exemption Program is to encourage certain educational aides to complete full teacher certification by providing need-based exemptions from the payment of tuition and certain mandatory fees at Texas public institutions of higher education.

- 21.1081. Definitions.

The following words and terms, when used in this subchapter, shall have the following meanings, unless the context clearly indicates otherwise:

- (1) Board – The Texas Higher Education Coordinating Board.
- (2) Commissioner – The Commissioner of Higher Education, the Chief Executive Officer of the Board.
- (3) Cost of attendance – A Board-approved estimate of the expenses incurred by a typical financial aid student attending a particular college or university. It includes direct educational costs (tuition, fees, books, and supplies) as well as indirect costs (room and board, transportation, and personal expenses).
- (4) Expected family contribution – The amount of discretionary income that should be available to a student from his or her resources and that of his/her family, as determined following the federal methodology.
- (5) Financial need – An indication of a student's inability to meet the full cost of attending a college or university, measured by one of the following methods:

(A) The cost of attendance at a particular public or private institution of higher education less the expected family contribution. The cost of attendance and family contribution are to be determined in accordance with Board guidelines; or

(B) An income methodology, which considers a student to have financial need if his or her adjusted gross annual income is less than income levels set annually by the Commissioner. If the student is a dependent, the family's adjusted gross family income is considered; if the student is independent, only the student's income (and the income of the student's spouse, if he or she is married) are considered.

(6) Program Officer – The individual named by each participating institution's chief executive officer to serve as agent for the Board. The Program Officer has primary responsibility for all ministerial acts required by the program, including maintenance of all records and preparation and submission of reports reflecting program transactions. Unless otherwise indicated by the administration, the director of student financial aid shall serve as Program Officer.

(7) Resident of Texas – A resident of the State of Texas as determined in accordance with Chapter 21, Subchapter B, of this title (relating to Determining Residence Status). Nonresident students who are eligible to pay resident tuition rates are not residents of Texas.

21.1082. Institutions.

(a) Eligibility.

(1) Any public institution of higher education as defined by Texas Education Code, Section 61.003, is eligible to participate in the Educational Aide Exemption Program.

(2) No institution may, on the grounds of race, color, national origin, gender, religion, age or disability exclude an individual from participation in, or deny the benefits of the program described in this subchapter.

(3) Each participating institution must follow the Civil Rights Act of 1964, Title VI (Public Law 88-353) in avoiding discrimination in admissions.

(b) Approval.

(1) Agreement. Each approved institution must enter into an agreement with the Board, the terms of which shall be prescribed by the Commissioner.

(2) Approval Deadline. An institution must be approved by April 1 in order for qualified students enrolled in that institution to be eligible to receive grants in the following fiscal year.

(c) Responsibilities.

(1) Probation Notice. If the institution is placed on probation by its accrediting agency, it must immediately advise scholarship recipients of this condition and maintain evidence in each student's file to demonstrate that the student was so informed.

(2) Disbursements to Students.

(A) Documentation. The institution must maintain records to prove the receipt of program funds by the student or the crediting of such funds to the student's school account.

(B) Procedures in Case of Illegal Disbursements. If the Commissioner has reason for concern that an institution has disbursed funds for unauthorized purposes, the Board will notify the Program Officer and Financial Aid Director and offer an opportunity for a hearing pursuant to the procedures outlined in Chapter 1 of this title (relating to Agency Administration). Thereafter, if the Board determines that funds have been improperly disbursed, the institution shall become primarily responsible for restoring the funds to the Board. No further disbursements of scholarships shall be permitted to students at that institution until the funds have been repaid.

(3) Reporting. Each participating institution must meet Board reporting requirements, in particular the submission of the Financial Aid Database Report, in a timely fashion.

(4) Program Reviews. If selected for such by the Board, participating institutions must submit to program reviews of activities related to the Educational Aide Exemption Program.

21.1083. Eligible Students.

To receive an award through the Educational Aide Exemption Program, a student must:

- (1) be a resident of Texas;
- (2) have at least one school year of full-time experience as an educational aide during the five years preceding the term or semester for which the student is awarded his or her initial exemption;
- (3) be employed in some capacity by a school district in Texas during the full term for which the student receives the award unless granted a hardship waiver as described in Section 21.1089 of this title (relating to Hardship Provisions);
- (4) show financial need;
- (5) be enrolled in courses required for teacher certification at the institution granting an exemption under this subchapter or (if enrolled in lower-level course-work),

sign a statement indicating an intention to become certified as a teacher and teach in Texas;

- (6) meet the academic progress standards of the institution; and
- (7) follow application procedures and schedules as indicated by the Board.

21.1084. The Application and Awarding Process.

(a) Application forms and instructions developed by the Board will be distributed primarily through school district offices throughout the state. The Board will also provide forms to financial aid offices of approved institutions and students may request the forms directly from the Board.

(b) The application has three parts that must be completed prior to the form's submission to the Board for processing.

(1) Part I is to be completed by the student applicant, who shall then forward the application to an authorized officer of the school or school district in which the applicant is employed.

(2) Part II is to be completed and signed by the school or school district authorized officer, who shall then forward the application to the financial aid office of the institution the applicant is attending.

(3) Part III is to be completed by the Program Officer at the institution, who shall then forward the application to the Board for processing.

(c) Applications will be processed by the Board as they are submitted by the institutions. Priority deadlines for submitting applications for the fall-spring terms and for the summer term will be announced in the instructions distributed with the applications. Applications received after those deadlines will be given consideration only if funds remain available after all applications received by the deadline have been processed.

(d) As soon as possible after processing applications, the Board will notify the relevant institutions, students and school districts of their awards. Institutions will be able to verify approval or a student's award through the Board's web site.

21.1085. Special Considerations if Funding is Limited.

(a) Allotment of Acceptable Applications. If funding is limited, the Board will limit the number of applications that may be submitted by an institution. This allotment will be announced to the institutions at least a month prior to the deadline for submitting applications.

(b) Recipient Selection. If funding is limited such that the Board cannot fund all applications submitted by approved institutions, the Board will select recipients on the basis of the following criteria:

- (1) the financial need of the student;

- (2) the number of years the student has been employed as an educational aide;
- (3) the priority assigned each applicant by the institution; and
- (4) the student's anticipated date for certification as a teacher.

(c) The number of awards made each year will depend on the funding available for reimbursing institutions for the exemptions they grant. No institution is required to award an exemption for which reimbursement funds are not available.

21.1086. Award Amounts and Processing Cycle.

(a) Amounts. Students receiving awards through the Educational Aide Exemption Program shall be exempted from the payment of (or reimbursed for) resident tuition and required fees, other than laboratory and class fees, for courses taken during the relevant term.

(b) Form of Award – Exemption or Reimbursement.

(1) If applications are processed and announced in time, institutions should exempt recipients from the payment of such charges and then request reimbursement from the Board.

(2) If applications are processed and/or announced too late for the student to be exempted from such payments at registration, the student may be required to pay these charges first, and then be reimbursed by the institution once reimbursement funds are received from the Board.

(c) Unique Requirements for Each Term.

(1) Fall awards are made on the basis of the original fall/spring application.

(2) Spring awards are based on the original fall/spring application. If the student was not a recipient during the fall term, the original application functions as a stand-alone spring application. If the applicant also received a fall award, the spring award will not be released until the school or school district confirms that it will still be employing the applicant in the spring term.

(3) Summer awards are to be based on a summer application that will be distributed only upon confirmation that there is funding available for summer awards. Institutions, current year award recipients and school districts will be advised by the Board of the availability of funds by March 1 of each year. At that time, the Board will distribute copies of the summer application and instructions.

21.1087. Reimbursements.

(a) Source of Funding. The funds used to reimburse institutions or students for awards made through the Educational Aide Exemption program will come from the state's Foundation School Fund and any gifts, grants and donations made to the Texas Education Agency for that purpose.

(b) Requesting Reimbursements. To request reimbursement for student awards, institutions must complete and submit a Request for Reimbursement Form designed and distributed by the Board. Such forms must be submitted to the Board with sufficient documentation (student billing information) to confirm that the requests are being made for authorized charges.

(c) Disbursements by the Board. The Board will process institutional Requests for Reimbursement at least once a month and will subsequently have appropriate amounts transferred to institutions by the State Comptroller's office. Such funds are to be used by the institutions either to reimburse itself (if it exempted the students from the payment of the relevant charges) or to reimburse students for the relevant charges they paid to the institution.

(d) Transfers from the Foundation Program. At least once a year the Board will request a transfer of funds from the foundation school fund for use in reimbursing institutions or students for their Educational Aide Exemption program awards.

21.1088. Exemption from Student Teaching.

(a) An individual who receives a bachelor's degree required for a teaching certificate on the basis of higher education coursework completed while receiving an award through this subchapter shall not be required by his or her institution to participate in any field experience or internship consisting of student teaching as a requirement to receive a teaching certificate.

(b) An individual who receives a bachelor's degree prior to receiving his or her first award under this subchapter is not eligible for a student teaching exemption under Subsection (a) of this Section.

21.1089. Hardship Provisions.

An individual is considered to meet the employment requirements listed in Section 21.1083(3) of this title (relating to Eligible Students) if he or she was employed at the beginning of the relevant term but was unable to remain employed throughout the term for reasons beyond his or her control. Such situations include, but are not limited to, the following:

(1) a severe illness or other debilitating condition that may affect the individual's ability to continue employment,

(2) responsibility for the care of a temporarily disabled dependent that may affect the recipient's ability to continue employment, or

(3) performance of active duty military service.

21.1090. Dissemination of Information and Rules.

The Board is responsible for publishing and disseminating general information and program rules for the program described in this subchapter.

Educational Aide Exemption Program Frequently Asked Questions and Answers

1. Can a student use the exemption for remedial or developmental courses?

Yes

2. What fees are covered by the exemption?

All fees that are considered mandatory by the institution are covered, with the exception of class and laboratory fees. There is not a set definition of class fees. Each institution will have to make its own interpretation.

3. Does the student have to file a FAFSA?

Please check with your institution to find out whether or not the FAFSA is required. The FAFSA is for their benefit, because it can be used to help a student prove eligibility for other aid as well as for this exemption. Financial need is a criterion and has to be determined by the institution. If the student is not to receive any other aid, institutions may determine the student's financial need by using his or her adjusted gross income (see the Coordinating Board rules).

4. Is a student who has defaulted on a loan eligible to receive this exemption?

Yes, as long as he or she is in good academic standing according to the Financial Aid Office. The student will need to be able to demonstrate financial need based on the Adjusted Gross Income (AGI) method.

5. If students are receiving student loans, do the loans reduce their need for the exemption?

No. The Coordinating Board rules indicate need is to be determined by subtracting family contribution and gift aid from the cost of attendance. To avoid an over award, you would note the amount the student is entitled to under the recommended award slot on the application. When a student's eligibility is determined for a loan, however, the exemption would be considered either as an adjustment to the cost of attendance or as a type of gift aid.

6. How does an institution determine if a student is taking classes leading to teacher certification?

If the student is attending a junior college, there should be a clear understanding that he or she is going to enroll in a university to get his/her teacher certification. If enrolled in lower-level coursework, the student should sign a statement indicating an intention to become certified as a teacher and teach in Texas.

7. Are students who possess a Bachelor's degree eligible for the exemption if all other requirements are met?

Yes. The student can receive the exemption, as long as the student is pursuing a teacher certificate and is otherwise eligible; it does not matter if he or she already has a bachelor's degree. An individual who receives a Bachelor's degree prior to receiving his or her first award is **not** eligible for an exemption from student teaching.

8. Are students who receive a Bachelor's degree required for a teaching certificate while receiving an award through this program eligible for a student teaching exemption?

Yes. The student shall not be required by his or her institution to participate in any field experience or internship consisting of student teaching as a requirement to receive a teaching certificate.

9. Does a university/college automatically award the exemptions or do the applicants have to be approved by the Coordinating Board first?

An award is not complete until the Board has certified the student's eligibility. If the institution feels comfortable, however, they can go ahead and grant the exemption on the basis of the eligibility criteria. If the institution does not feel comfortable certifying student eligibility, they should wait for our letter.

10. When should an institution award the exemption?

The exemption should be awarded as soon as the institution is notified by the Board that the student is eligible. If the student has already paid for his or her tuition and relevant fees before the college receives the letter, the institution needs to send the Board a Reimbursement Request, and the student will be refunded. If the institution exempted the student automatically, a Reimbursement Request will still need to be submitted to the Board. The Financial Aid Office of each institution will need to notify their Business Office of the amount each student is to be exempted through this program. **Keep in mind that the maximum amount an eligible student can receive is his/her financial need or tuition and relevant fees, whichever is less.**

11. What are the procedures for requesting a reimbursement?

Once an award letter has been received and the institution knows how much is to be reimbursed (which is usually after the 12th class day), an institution must submit a Reimbursement Request Form to the Coordinating Board. **DO NOT SEND A REIMBURSEMENT REQUEST FOR A STUDENT IF YOU HAVE NOT RECEIVED AN AWARD LETTER FOR HIM/HER.** If a student was automatically exempted, Part A needs to be completed. If a student paid for his or her tuition and relevant fees, Part B needs to be completed. If a student paid half of the tuition and relevant fees and the other half was automatically exempted, then the amounts need to be reported on Part A and B. The Board will then request the funds. Requests are only made on the 1st and 15th of each month. It takes approximately 2-3 weeks for the Board to receive the funds after they have been requested. When the funds are received, the Board will Electronically Transfer Funds (EFT) to the institution. The Reporting Officer will receive an EFT email notification which includes the list of students and dollar amounts to be disbursed.

12. Will all students who apply be exempted?

To date we have enough money to fund all who apply and meet all the criteria. If there are any changes to this, institutions will be notified.

13. Who is able to sign Part II of the application?

Anyone who is authorized to sign personnel actions may verify the applicant's current and previous employment, including Principals, Personnel Directors and Superintendents in the school district, but not secretaries or teachers. The person who signs Part II is certifying that he or she verifies the aide's required year of employment or the substitute teacher's 180 days of employment.

14. Are Institutions supposed to be the “police officer” for this program, in verifying the aide’s employment?

No. The person who signs Part II of the application is verifying that the aide/substitute teacher will be or has been employed and we will take their word for it. If the institution finds out that the aide/substitute teacher is not to be employed or has not been employed, then they can notify us and we will follow up on it, but that is as far as the institution needs to go.

15. Is there a certain number of hours an aide must be enrolled or employed in?

No. There is nothing in law that indicates the number of hours in which an aide must be enrolled or his or her level of employment, but the aide **must** be employed while receiving the exemption and must be enrolled in classes leading to teacher certification. Please keep in mind that the institution may have guidelines regarding the number of enrollment hours, therefore those requirements will have to be met.

16. Explain the term “aide”.

An Educational Aide is a person who is employed by a public school district in Texas working in the classroom directly with students.

17. How does an institution determine a student’s recommended award if they use the Adjusted Gross Income method?

The recommended award would be the student’s tuition and mandatory fees (other than class or laboratory fees), which is also the amount the student will be receiving through this exemption only. Keep in mind that this is just an estimated amount and the actual amount will be reported when the institution sends us a Reimbursement Request Form.

18. Is the Building Use Fee which is now considered Tuition at Universities, covered under this exemption?

Yes. The Building Use Fee has been re-designated as tuition.

19. When does the one year of experience need to be completed?

The educational aide must have one school year of full-time educational aide experience during the five years preceding the term or semester for which the student is awarded his or her initial exemption. The one year of experience is one school year, so summer is not included.

20. What if a student receives the exemption, but is later found ineligible?

The school would have a 10-day window from the time they became aware of their error to make good on the tuition payment. It would be similar to a student paying by check, but the check not clearing the bank. If the charge is covered in the 10-day period, the funding from the state for the hours is safe.

21. Will the institutions be notified if a student is eligible to receive the exemption in the Spring term?

Each November, the Coordinating Board will send the school districts a roster asking them to verify the aides/substitute teacher's employment for the spring term. Once the Board receives the roster back from the school districts, spring letters are processed and mailed out. A spring award letter is not sent out unless the roster is received. *If the student does not receive the letter before payment is due, he or she will need to pay up front and then will be refunded later. In order to avoid paying up front, the student may want to notify their school district that the rosters were mailed in November and they can fax the verifications to the Board.

22. Will a student be able to utilize this exemption if he or she enrolls for a mini session?

Mini sessions can be awarded, but will need to be based on the fall or spring letter. For example, if a student is enrolled over the Christmas holiday, the award would be based on the Fall certification. If the student is enrolled over Spring Break, the award would be based on the Spring certification.

23. What happens if a student drops hours or withdraws after an institution has submitted the request for reimbursement and payment has been received?

The institution will use their internal billing policies.

24. What if a student applies for the exemption and shows no need?

If a student shows no need though either the FAFSA or their Adjusted Gross Income, he or she is not eligible to participate in the program. The application can still be submitted for statistical purposes. We need to be able to report how many aides are being turned away because of the need criterion. When submitting the "no need" application, simply write on the slot asking for financial need "Need equals 0, not eligible based on FAFSA or AGI".

25. What if a student is co-enrolled, can they receive the exemption at both institutions?

Yes. A separate application must be submitted for each college.

26. If a student did not make satisfactory academic progress in the fall, but does in the spring, is he or she eligible for the spring term?

No. A requirement for a student to be eligible for the spring term is that he or she must have made satisfactory academic progress in the fall according to the financial aid office. If the student brings up his or her performance in the spring, he or she may receive an exemption in the following semester.

27. Does a student need to apply every semester or every year?

A student needs to apply every year. There are separate applications for fall/spring and for summer. A separate application is required for the summer term since it is only funded upon the availability of funds. Spring awards are made once we receive the roster back from the school district verifying the certified aide's/substitute teacher's spring employment.

28. Which institutions are eligible to participate?

The only institutions eligible to participate are public institutions of higher education.

29. If a student is taking an extension class, is he or she able to participate in the program?

In general, courses that are covered by this exemption are those that are offered for credit, are a part of the student's preparation for becoming a teacher and are offered by public institutions of higher education.

30. Are correspondence courses covered by this exemption?

Only if the correspondence course is one for which the school receives formula funding from the state; the course is a part of the student's curriculum for becoming a teacher; and the college can derive a valid financial need calculation for the student.

31. Is there a deadline to submit the application for a Certified Educational Aide Exemption?

Completed applications must be submitted to the Coordinating Board by the deadline date. Summer 2007 must be submitted by October 1, 2007. Fall 2007 must be submitted by February 1, 2008. Spring 2008 must be submitted by July 1, 2008.

32. Which Income Tax Form must be used?

If the student is qualifying based on their adjusted gross income, their most recent income tax form must be used. If the student is qualifying based on their FAFSA, then the institution would use the FAFSA that pertains to the academic year the student is qualifying for.

33. Can substitute teachers participate?

Yes. If the substitute teacher has acquired one school year of full-time educational aide experience, then substitute teaching falls under a school employee serving in any capacity. If the substitute teacher has not acquired one school year of full-time educational aide experience, then the applicant must provide documentation of 180 full days of service as a substitute teacher to their school or school district. The school district will need to keep documentation on file. The applicant must meet all other eligibility requirements.

34. High School Juniors and Seniors have the opportunity to participate in a Business/Co-op program in which they are employed with the school. Can this count towards the one year of educational aide experience for the educational aide program?

No. Since the students do not have their High School degrees, they do not meet the general requirements ISD's require for aides.

35. Can school bus drivers participate?

Yes. If the school bus driver has acquired one school year of educational aide experience within the past 5 years, then a school bus driver falls under a school employee serving in any capacity. The applicant must meet all of the eligibility requirements.

36. Can a volunteer at the school district participate?

No. The applicant must be employed with a school or school district. This means the school district is **paying** the applicant a salary.

37. I work at the school district, but I'm not being paid by the school district, can I participate?

No. The school district has to **employ** and **pay** the applicant a salary.

38. I want to enroll in the Alternative Certification Program, can I participate?

If the institution you plan to attend receives formula funding (tax support) for the hours the student is enrolled, then yes, the student may participate. All of the eligibility requirements must be met.

39. Can I enroll at a private institution?

No. The exemption is for eligible Texas public community colleges and Texas public universities only.

40. I want to quit my job while I'm in school, can I participate?

One of the eligibility requirements is that the individual must be employed during the full-term in which he/she receives the exemption unless granted a hardship waiver.

41. What is a hardship waiver?

A hardship waiver can be granted if the student was employed at the beginning of the relevant term, but was unable to remain employed throughout the term for reasons beyond his/her control. Such situations include, but are not limited to, the following:

- (1) a severe illness or other debilitating condition that may affect the individual's ability to continue employment,
- (2) responsibility for the care of a temporarily disabled dependent that may affect the recipient's ability to continue employment, or
- (3) performance of active duty military service.

42. Can the institution submit the request for reimbursement the same time as the application?

Only if the student has already paid tuition and fees and documentation of charges is also submitted. Once the application has been reviewed and the student is approved, we will electronically transfer funds to the institution.