



**TEXAS HIGHER EDUCATION  
COORDINATING BOARD**  
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*This email message is sent on behalf of Dr. Charles W. Puls, Deputy Assistant Commissioner,  
Student Financial Aid Programs, Texas Higher Education Coordinating Board*

**MEMORANDUM**

September 26, 2019

**To:** Presidents, Chancellors, Reporting Officials, IR Officers, Liaisons (copied), Chief Academic Officers, Chief Instructional Officers, Chief Financial Aid Officers, and Registrars at Texas Public Institutions of Higher Education

**From:** Charles W. Puls, Ed.D.

**RE:** Timely Disbursement of Financial Aid Funds and Tuition Refunds

The information below pertains to the timely disbursement of financial aid and tuition refunds. Please contact David Gardner, Deputy Commissioner for Academic Planning and Policy/CAO, at david.gardner@thehb.state.tx.us if the Coordinating Board can be of assistance on other issues related to Tropical Storm Imelda.

**Timely Disbursement of Funds**

The Timely Distribution of Funds section of the Texas Administrative Code (TAC), Section 22.2 includes a Timely Disbursement expectation. This expectation requires institutions to disburse student financial aid funding (other than work-study) to a student recipient's account no later than three business days after receiving the funds. Undisbursed funds must be returned to the Texas Higher Education Coordinating Board (THECB) no later than six business days after the receipt of funds.

For those institutions impacted by Tropical Storm Imelda (see attached memo on reporting sent on 9.23.19), the Timely Disbursement expectations will be adjusted as follows:

- Institutions impacted by the storm should disburse state student financial aid funding to a recipient's account as quickly as each institution's operations will allow in light of the impact of Tropical Storm Imelda; and
- Institutions impacted by the storm have 30 business days after the receipt of the funds to return undisbursed funds to the THECB.

This adjustment of the Timely Disbursement expectation will apply to all state financial aid funds disbursed to institutions by the THECB through October 18, 2019, after which the timely disbursement expectation included in TAC, Section 22.2 will apply.

Institutions on the attached list do not need to make a specific request to utilize the adjusted expectations. If your institution is not included on the list of schools located in affected areas, but did suffer disruption that will prevent you from meeting the standard timely disbursement expectations, please contact me at Charles.Puls@thehb.state.tx.us or 512-427-6365.

### **Tuition Refunds at Two-Year Colleges**

As per the memo sent on September 23, 2019, the THECB has allowed institutions affected by Tropical Storm Imelda and its aftermath to delay their Census Date (if not already passed) and to delay their fall enrollment reporting for up to two weeks past the posted schedules. Refund policies are tied to the Census Date for community/junior and technical colleges that are required to collect minimum payments under TAC, Rule 21.5 (see attachment). The THECB strongly encourages affected institutions to allow for more generous refund policies, as warranted. In addition, we hope that both affected and non-affected institutions will work individually with students who were directly impacted by Tropical Storm Imelda, should more flexibility be needed related to tuition refunds.

Note that, as related to TAC, Rule 21.4, regarding dates for reporting official enrollments to the THECB by community colleges and the collection of tuition from students who are counted for formula funding, fall 2019 is not part of a formula funding base year, which provides greater flexibility around reporting requirements for student enrollments. Institutions should contact Victor Reyna at Victor.Reyna@theccb.state.tx.us regarding reporting requirements should delays be anticipated as a result of students with special circumstances.

### **Tuition Refunds at General Academic Institutions (including HRIs)**

As per the memo sent on September 23, 2019, the THECB has allowed institutions affected by Tropical Storm Imelda and its aftermath to delay their Census Date and fall enrollment reporting for up to two weeks and to adjust their 20th class days accordingly. Refund policies are tied to the 20th class day date for General Academic Institutions (GAIs), which are required to collect minimum payments under Texas Education Code (TEC), Section 54.006 (see attachment 2). The THECB strongly encourages all institutions to consider more generous refund policies, as allowable by TEC, Section 54.006 (b-2) for students who were directly impacted by Tropical Storm Imelda.

Note that, regarding dates for reporting official enrollments to the THECB, fall 2019 is not part of a formula funding base year, which provides greater flexibility around reporting requirements for student enrollments. Institutions should contact Victor Reyna at Victor.Reyna@theccb.state.tx.us regarding reporting requirements should delays be anticipated as a result of students with special circumstances.

### **Due Dates for Payments at all Public Institutions**

As per previous guidance from the THECB, as long as there is a plan in place by the Census Date (for community colleges) or the 20th class day (for GAIs) for students to pay tuition, the student does not have to have paid tuition in full on that day for the student's classes to be reported as fundable to the THECB.

For institutions other than community colleges, TAC Rule 21.4 requires that tuition shall be paid in full by the 20th class day unless there is a payment plan in place (this applies to students who are included in official enrollment reports). However, if the storm impacted timely payment of tuition by a student for whom no plan was in place, collection of full tuition may be delayed for a reasonable period not to extend beyond the Coordinating Board's initial reporting deadline for fall semester enrollments. This includes any extended deadlines granted as per the memo sent by David Gardner on September 23, 2019.

#### **Attachments**

Memorandum from Dr. David Gardner dated September 23, 2019  
List of Institutions Affected by Tropical Storm Imelda  
Texas Administrative Code, Sections 21.4 and 21.5  
Texas Education Code, Section 54.006

c: Jacob Fraire, Texas Association of Community Colleges  
Rissa McGuire, Council of Public University Presidents and Chancellors  
Universities and Health-Related Institutions Institutional Liaisons  
Community, State, and Technical College Liaisons  
Coordinating Board Members and Executive Officers/Staff

- [09-26-2019 Timely Disbursement of Financial Aid Funds and Tuition Refunds Memo with attachments.pdf](#)