**University Scholarship Policy UPPS No. 02.05.01
Issue No. 10
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**Sr. Reviewer: Assistant Vice President, Financial Aid and Scholarships and Chair, Financial Aid Advisory, Appeals, and Scholarship Awards Committee**

**POLICY STATEMENT**

*Texas State University is committed to providing effective and compliant administration of university scholarships.*

**01. SCOPE**

01.01 The guidelines presented in this document establish principles, policies, and responsibilities for the coordination of scholarship activities throughout Texas State University.

**02. RESPONSIBILITIES OF THE FINANCIAL AID ADVISORY, APPEALS, AND SCHOLARSHIP AWARDS COMMITTEE**

02.01 The Financial Aid Advisory, Appeals, and Scholarship Awards Committee will be composed of at least two students, seven faculty, two academic deans or their designees, head of Financial Aid and Scholarships, head of Undergraduate Admissions or designee, and a representative from both Student Success and University Advancement. The Committee is responsible for the development of general policy regarding the awarding of undergraduate scholarships administered by Financial Aid and Scholarships (including the university’s national and assured scholarships). In addition, while the Committee does not specifically select scholarship recipients, the members will recommend scholarship ranking formulas or conduct a review and overall assessment of the applications received from students who wish to be considered for university scholarships awarded by Financial Aid and Scholarships. Financial Aid and Scholarships will then award these scholarships.

02.02 The Committee has four primary charges:

1. recommending to the associate vice president for Enrollment Management overall university policies for all Texas State scholarship programs;
2. recommending to the associate vice president for Enrollment Management policies regarding need-based aid;

c. conducting reviews and overall assessments of scholarship applications, as well as scholarship awarding formulas, for which Financial Aid and Scholarships has awarding responsibility; and

d. serving as the final body for appeals pertaining to financial aid eligibility and athletic scholarships.

02.03 For scholarships and fellowships administered exclusively at the graduate level, the dean of The Graduate College will determine related policy.

**03. GENERAL SCHOLARSHIP INFORMATION**

03.01 The university will award university scholarships on a competitive basis, as early as the preceding school year, and consistent with adequate safeguards to ensure fairness and full publicity. Student athletes are eligible for academic awards; however, NCAA regulations shall take precedence when awarding academic scholarships to student athletes.

03.02 The university’s scholarship application, which is administered by Financial Aid and Scholarships, is available via the [Bobcat Online Scholarship System (BOSS)](http://www.finaid.txstate.edu/scholarships/boss.html). Financial Aid and Scholarships will provide administrative and committee access to [BOSS](https://www.finaid.txstate.edu/scholarships/boss.html) for specific scholarships as requested by the appropriate account manager.

**04. PROCEDURES FOR APPEALS OF SCHOLARSHIP TERMINATION**

04.01 If a student does not meet the renewal criteria of their scholarship, a student may appeal the termination of that scholarship based on extenuating circumstances (e.g., severe illness, death of an immediate family member, etc.). The account manager for a scholarship will establish the procedures and criteria for their review of such appeals.

04.02 For a student’s appeal to be considered, it must be submitted no later than 45 days prior to the start (first class day) of the relevant academic year or semester. The only exception to this deadline would be if the student was not able to submit the appeal on time due to incapacitation.

04.03 For scholarships administered by Financial Aid and Scholarships (e.g., national and assured scholarships), the assistant director for Financial Aid and Scholarships is responsible for reviewing scholarship appeals.

**05.** **CONSIDERATIONS PRIOR TO AWARDING FUNDS**

05.01 When awarding funds to a student, whether from a grant, scholarship, or internal and external fellowship, the awarding department will need to enter the award via [BOSS](https://www.finaid.txstate.edu/scholarships/boss.html) (or, if the scholarship is not established in [BOSS](https://www.finaid.txstate.edu/scholarships/boss.html) via the [Scholarship Recipient List](http://www.finaid.txstate.edu/forms/SRL.pdf)) or appropriate [Accounts Payable form](http://www.txstate.edu/gao/ap/forms.htm). To determine which payment process is appropriate, the awarding department should review the [Awarding University Funds to Students webpage](http://www.txstate.edu/research/avpr/Awarding-University-Funds-to-Students.html). Regardless of the payment process, any funds disbursed by the university to help defray a student’s educationally-related expenses will be considered a form of financial assistance for purposes of determining overall financial aid eligibility (see [34 CFR 673.5(c)](https://www.ecfr.gov/current/title-34/subtitle-B/chapter-VI/part-673/subpart-B/section-673.5)).

05.02 Even though certain awards may be intended to assist with educational costs such as research, students do not have the ability to purchase certain materials or substances (such as chemicals or live specimens) as an individual on the open market. When such items are needed for a student’s research project, the portion of a student’s award covering these costs will be placed in a university account. The university will then make the purchases on the student’s behalf using the appropriate [Accounts Payable form](http://www.txstate.edu/gao/ap/forms.htm).

05.03 In some cases, equipment may also be purchased under this method (i.e., using the appropriate [Accounts Payable form](http://www.txstate.edu/gao/ap/forms.htm)). Please note that when purchased in this manner, Texas State assumes ownership of such purchased supplies or equipment. Under this method, Texas State will always make payment directly to the vendors for these purchases. Students should never pay directly for such items and later request reimbursement.

05.04 With the exception of scholarship funds used to purchase controlled materials or substances (see Section 05.02), scholarship awards will be processed via Financial Aid and Scholarships. Processing of awards through Financial Aid and Scholarships helps ensure compliance with applicable federal [Title IV regulations](https://fas.org/sgp/crs/misc/R43159.pdf).

05.05 Prior to awarding funds for the first time from a scholarship account, the awarding department will provide the assistant director of Financial Aid and Scholarships with the established criteria used to select recipients. The criteria information for establishing a scholarship in [BOSS](https://www.finaid.txstate.edu/scholarships/boss.html) will be communicated using the [BOSS – Configuration Form](https://www.finaid.txstate.edu/forms/BOSSCF.pdf). The university will use the information provided on this form to establish the scholarship in [BOSS](https://www.finaid.txstate.edu/scholarships/boss.html) and create a Financial Aid fund code in the student information system (SIS) for the scholarship, which will allow the tracking and disbursement of individual scholarship funds within the SIS. If a department’s scholarships are not managed in [BOSS](https://www.finaid.txstate.edu/scholarships/boss.html), a [Scholarship Banner Fund Form](https://www.finaid.txstate.edu/forms/Scholarship_Banner_Fund_Form.pdf) should be submitted to establish a Financial Aid fund code in the SIS.

05.06 To ensure access and competitive scholarship applicant pools, departments should open their scholarship applications via [BOSS](https://www.finaid.txstate.edu/scholarships/boss.html) by no later than November 1 prior to the upcoming academic year. This and other important scholarship dates can be viewed on the [BOSS Timeline](https://www.finaid.txstate.edu/forms/BOSS_Timeline.pdf).

**06. GENERAL AWARDING PROCEDURES**

06.01 The awarding department (as well as any school, college, and other award groups or committees) will notify the assistant director of Financial Aid and Scholarships of their award decisions via [BOSS](http://www.finaid.txstate.edu/scholarships/boss.html) (or, if a scholarship is not established in BOSS via the [Scholarship Recipient List](http://www.finaid.txstate.edu/forms/SRL.pdf)). The timing of scholarship offers should help optimize the university’s recruitment and retention efforts. In addition, the timing of scholarship offers should assist with the coordination of overall aid offers and avoid situations where students must repay their financial assistance. To achieve these university objectives, departments must make their initial (i.e., non-alternate) round of scholarship offers for the upcoming academic year by the deadlines below:

1. Undergraduate Scholarship Awarding Deadlines
2. Incoming freshmen students – March 15
3. Incoming transfer students – May 1

3) Returning students – May 1

1. Graduate and Certificate-Seeking Scholarship Awarding Deadlines
2. Incoming students – March 31

2) Continuing students –May 1

In certain unique situations, scholarships may need to be awarded later than the deadlines above. Exceptions to these deadlines may be made if approved by the assistant vice president for Financial Aid and Scholarships (for undergraduate scholarships) or appropriate college dean (for graduate and certificate-seeking scholarships).

06.02 As part of the awarding process, a department (as well as a school, college, and other award groups or committees) must also:

1. provide timely notification to their award recipients and publicize the awards as appropriate;
2. notify the award recipients that their receipt of a scholarship may affect their other financial aid and to visit with Financial Aid and Scholarships regarding any related questions; and
3. if applicable, notify a student receiving a qualifying competitive scholarship of at least $1,000 of their receiving a waiver of nonresident tuition (for the period of time covered by the scholarship), as well as Student Business Services (within five business days of the scholarship being offered) via the [Competitive Scholarships Waiver](http://www.collegeforalltexans.com/apps/financialaid/tofa2.cfm?ID=435) under [University Approved Forms](http://www.sbs.txstate.edu/students/waivers-exemptions.html).

06.03 Scholarship funds will be disbursed via Student Business Services. Scholarship funds will first be applied as a credit toward a recipient’s outstanding institutional charges. Funds remaining after this crediting process will be forwarded to the student. The only exception will be for grant and scholarship accounts for which the grantor or donor (e.g., U.S. Department of Education) requires the educationally-related funds to be used for specific educational purposes (e.g., a student’s research costs). Such exception requests from awarding departments will be reviewed and approved by the assistant director of Financial Aid and Scholarships.

06.04 In any given academic year, a student’s institutional scholarships and/or any other financial aid may not exceed a student’s financial need and cost of attendance, as determined by Financial Aid and Scholarships. When reduction of financial aid is necessary to resolve an over-award, Financial Aid and Scholarships will first attempt to resolve the over-award by reducing any loans and then work-study awarded to the recipient.

06.05 Students who receive Texas State scholarships may accept scholarships from external sources.

06.06 Students who receive scholarships may have some income tax implications. For specific tax questions, students should consult with their tax professional, as Texas State is not able to provide individual tax advice. Students may also find it helpful to read [IRS Publication 970, Tax Benefits for Education](https://www.irs.gov/pub/irs-pdf/p970.pdf). All federal income tax forms and publications may be downloaded from the [IRS website](https://www.irs.gov/).

**07. REVIEWERS OF THIS UPPS**

07.01 Reviewers of this UPPS include the following:

Position Date

Assistant Vice President, Financial August 1 E3Y

Aid and Scholarships and Chair,

Financial Aid Advisory, Appeals,

and Scholarship Awards Committee

Assistant Director, Financial Aid and August 1 E3Y

Scholarships

**08. CERTIFICATION STATEMENT**

This UPPS has been approved by the following individuals in their official capacities and represents Texas State policy and procedure from the date of this document until superseded.

Assistant Vice President, Financial Aid and Scholarships and Chair, Financial Aid Advisory, Appeals, and Scholarship Awards Committee; senior reviewer of this UPPS

Associate Vice President for Enrollment Management

Vice President for TXST Global

President