Texas Higher Education Coordinating Board

(800) 242-3062
www.collegeforalltexans.com

Hazlewood Exemption Application Packet For Veterans

(HE-V)

The HE-V application is for veterans who wish to apply for Hazlewood benefits as new or previous recipients OR to request their unused hours be transferred to an eligible child.

* Contact your institution to find out where and when you should submit the application and supporting documentation. The institution will process your application accordingly. Do **NOT** mail the application to the Texas Higher Education Coordinating Board.

Hazlewood Exemption Application for Veterans who have Never Used the Exemption

Eligibility Requirements and Documentation

In order to qualify for a tuition and partial fee exemption through the Texas Education Code 54.203 (known as the Hazlewood Act), a person must meet all program requirements. The following is a list of program requirements and how they are documented.

Eligibility Requirement	**Application Questions**	**Documentation**
Not in default on a loan made or guaranteed by the state of Texas. These loans include the College Access Loan Program (CAL), the Health Education Loan Program (HELP), the state's Federal Family Education Loan Program (FFELP) and the Texas B-On-Time Loan Program (BOT). Federal loans are not included.	Question 5	Applicants with loans made through the Texas Higher Education Coordinating Board must log into www.HHLoans.com and print their student loan report to provide to the institution. Applicants without a loan with THECB will be verified by the institution and the program administrator at THECB.
If eligible for federal veteran's education benefits under Ch. 33 Post 911 GI Bill or Ch. 31 Vocational Rehab, the value of these benefits cannot exceed the value of the Hazlewood exemption. If you have served additional active duty since your discharge, your federal education benefits letter must be current and no more than 3 months old.	Questions 6 and 7	Benefit letter from VA Education Center in Muskogee, Oklahoma, 1-888-GI-Bill-1 or 1-888-442-4551 or www.gibill.va.gov . If the veteran has not served since 9/11, he/she does NOT have to provide a copy of his/her federal veteran's education benefits letter. If the veteran has served since 9/11 then a letter is required.
Eligible veterans must have met one of the following requirements at the *"time of entry"* into the service: • Entered the service in Texas; • Declared Texas as home of record, or • Was a Texas resident.	Question 8	DD214 shows place of entry and home of record at time of entry. If the DD214 shows HOR and Place of Entry were both not Texas, you must complete the Hazlewood Residency Questionnaire and submit it with your application. A copy of that questionnaire is included in this packet.
Veterans who receive the Hazlewood Exemption for the first time beginning on or after fall 2011 must reside in the State of Texas during the semester or term for which you claim the exemption.	Question 9	Veterans must provide proof to the institution that he/she is residing in Texas during the semester that the exemption is to be used.
Have an honorable or general under honorable conditions discharge or separation.	Question 10	DD214 shows character of service. The Hazlewood administrator will review this document.
Served at least 181 days of active duty (excluding training).	Question 11	DD214 shows dates of service and days of active duty. The Hazlewood administrator will review this document.

Documents to Submit

To apply for an Exemption, you must submit the following documents to your institution:

1. **The Hazlewood Exemption Application for Veterans**
2. **DD214 –** for use in verifying your service-entry status, character of service, length of service, and dates of service. Make sure the copy you provide your institution includes all relevant information.

The easiest way to acquire a new DD-214 is to contact the VA regional office in Waco or Houston:

Houston Regional Office
6900 Almeda Road
Houston, TX 77030-4200
1-800-827-1000
713-383-5340

Waco Regional Office
One Veteran Plaza
701 Clay Avenue
Waco, TX 76799
1-800-827-1000
254-299-9774

3. **Benefits letter from Muskogee, Oklahoma –** to verify the value of your federal veteran's education benefits (Ch 33 or CH 31) that you are receiving. 1-888-442-4551

4. **Hazlewood Residency Questionnaire for Veterans** – If you did not enter the service in Texas or declare Texas as your Home of Record when you entered the service, you must have been a resident of Texas when you entered in order to qualify for Hazlewood.

5. **Proof of Online Database Registration –** All applicants (veteran and dependents) must register online in order to track hours used through the program. Once registered applicants must login and print a verification page for the institution.
   - https://www1.thecb.state.tx.us/apps/hsh/students/

Texas Higher Education Coordinating Board

HAZLEWOOD EXEMPTION (HAZLEWOOD ACT)

APPLICATION FOR VETERANS

Each veteran wishing to receive or transfer his/her unused hours of exemption through Hazlewood or the Legacy Act (Texas Education Code 54.341) must complete and sign the following application and provide his/her institution documentation of eligibility as indicated in this application packet.

Mail this application and all documentation to your institution's veteran's education office or financial aid office.

Part A – Basic Eligibility

1. Name: _____
   Last First Middle Initial

2. Social Security Number:_____ Date of Birth:_____

3a. Address:_____
   Street City State Zip Code

3b. Phone Number: ( )_____ Email: _____

4. Term for which you are applying for the exemption: _____/_____
   * Form must be renewed each semester. (fall, spring, summer) / year

5. Are you currently in default on an education loan made or guaranteed by the state of Texas?
   * See instructions above. [ ] yes [ ] no

6. Are you currently eligible to receive veteran benefits under "vocational rehabilitation & employment" (Ch. 31) or Post 9/11 GI Bill (Ch. 33)? [ ] yes [ ] no

7. Have you served any active duty since your discharge from the service? [ ] yes [ ] no
   If yes, your VA benefits letter must be current (dated no more than 3 months ago).

8. At the time you entered the service, did any of the following circumstances apply to you?
   a. Was your place of entry Texas? [ ] yes [ ] no
   b. Did you declare Texas as your Home of Record? [ ] yes [ ] no
   c. Were you a Texas resident? [ ] yes [ ] no
   * If you answered "no" to 8a, 8b, and 8c, you are not eligible for a Hazlewood exemption. If you can only answer "yes" to question (c.), then you must complete the residency questionnaire.

9. Will you reside in the state of Texas during the upcoming semester for which the exemption will be used? (must provide proof) [ ] yes [ ] no

10. Did you receive an honorable or general under honorable conditions discharge?
    [ ] yes [ ] no

11. Did you serve at least 181 days on active duty (excluding training)? This is indicated in boxes 12(c) and 12(d) on the DD-214. [ ] yes [ ] no

If you are a veteran applying to receive the Hazlewood Exemption for the 1st time, complete A and Part D- Certification and Consent to Disclosure.

If you are a veteran who previously received a Hazlewood Exemption, complete part A and B and proceed to Part D- Certification and Consent to Disclosure.

If you are a veteran wishing to transfer unused hours to an eligible child, complete part A and C and proceed to Part D- Certification and Consent to Disclosure.

Part B - For Previous Exemption Recipients

12. Last term in which you used the Hazlewood exemption _____/_____
(fall, spring, summer)/ year

13. Name of all colleges or universities where you have received the exemption_____
_____

* veteran must login online, printout, and provide their hours used to the school along with this application.
https://www1.thecb.state.tx.us/apps/hsh/students/

Part C - Request to Transfer Unused Exemption Hours to a Child

* Hours can only be transferred to one child at a time up to 150 hours and the student must make satisfactory academic progress as determined by the institution.

14. (a) Each veteran eligible for a Hazlewood Exemption is entitled to 150 semester credit hours of exemption. How many of your 150 hours' of eligibility have you used as of the date you sign this form? _____

14. (b) Have you already transferred hours to any other child(ren)? ☐ Yes ☐ No
Children's names and SSN _____

15. When was the LAST TIME you used your Hazlewood Exemption?

☐ Never ☐ Fall 1995 or earlier

☐ Spring 1996 or later: _____ _____
Semester Year (mmddyyyy)

16. Name of all colleges or univeristies where you have received the exemption.
_____

17. Child's Name *(First, Middle Initial, Last)*
_____

18. Child's Social Security Number

19. Texas Residency (Child)
☐ Yes ☐ No

20. Is the child one of the following: your biological child, your stepchild, your adopted child, or did you claim him/her as a dependent in the current or previous tax year? ☐ Yes ☐ No

21. Is the child currently 25 years or younger? ☐ Yes ☐ No

If you answered "no" to question 19 or 20, the child is not eligible for the Hazlewood Exemption.

Part C – II – Certification and Signatures

My name is _____and I waive the right to the unused portion of my 150 semester credit hours for which I am eligible to receive under the Hazlewood Exemption and grant permission to transfer those unused Hazlewood hours under the Texas Education Code, Section 54.203, (k)(The Hazlewood Exemption) to my eligible child, _____. I agree to release current semester and historic credit hour information to the Texas Higher Education Coordinating Board ("Board") and to determine the balance of my unused hours. I grant permission for the Board to share such data with any institution that my eligible child might attend. I hereby certify the information I have provided is true and correct. I understand that if I fail to provide accurate information, I may be required to reimburse the institution and penalties may be imposed.

Signature of Service Member _____ Date _____

* if veteran is deceased the surviving spouse or child's guardian, conservator, custodian, or other legally designated caretaker can sign on the veteran's behalf.

Signature of Child _____ Date _____

For Institutions Only

Approval (initials) _____	On file : completed/approved [ ] HE-V [ ] HE-D	Eligible child: Yes [ ] No [ ]	# hours of eligibility remaining at the beginning of the term _____

Part D – Certification and Consent

My name is _____ and I am applying for an exemption from payment of tuition and certain fees under Texas Education Code, Section 54.203 (The Hazlewood Act). I understand that I may be entitled, under the law, to this exemption for up for 150 credit hours total at Texas public institutions of higher education. For the purpose of accounting for the total number of hours for which I receive this exemption, I am granting permission to any institution in which I have enrolled or will enroll to release current semester and historic credit hour information to the Texas Higher Education Coordinating Board ("Board") and am granting permission for the Board to share such data with any institution that I might attend. I hereby certify the information I have provided is true and correct. I understand that if I fail to provide accurate information, I may be required to reimburse the institution and penalties may be imposed.

_____ _____

Signature Date

After completing and signing this form, <u>SUBMIT IT TO YOUR INSTITUTION</u>. If your answers to question 8a, 8b were "no", you also must complete and submit the Hazlewood Exemption Residency Questionnaire for Veterans

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Approved (initials): _____		Acceptable discharge? [ ] yes [ ] no	TX Resident [ ] yes [ ] no	
Term Ch 33 VA benefit amt: $_____		181 days of active duty? [ ] yes [ ] no	In default? [ ] yes [ ] no	
Place of entry TX? [ ] yes [ ] no	HOR Texas [ ] yes [ ] no	Number of hours remaining. #_____	Vet Entry Residency Form supports residency? [ ] yes [ ] no [ ] n/a	Muskogee ltr on file? [ ] yes [ ] no

Instructions for Completing the Hazlewood Exemption Residency Questionnaire for Veterans

<u>The Residency Questionnaire is NOT required for persons who answered "yes" to 8a or 8b</u>.

Part A	Self-explanatory
Part B	A veteran was a Texas resident for higher education purposes if he or she graduated from a Texas high school or received a GED in Texas having lived in the state for the 36 months leading up to graduation or the receipt of a GED and he or she also lived in Texas the 12 months prior to enlistment. The 12-month period may overlap the 36-month period leading up to graduation or receipt of GED.
Part C	Residency of a minor or dependent who did not meet the requirements outlined in Part B is based on the residency of the parent or legal guardian who claimed him/her as a dependent for federal income tax purposes. Residency of an independent, self-supporting person is based on his/her own circumstances. Answers to C impact which parts of the application will need to be completed to determine your residency classification when you entered the service.
D1-D3	These questions should only be answered by individuals who do not meet the requirements outlined in Part B and who were independent, self-supporting when they entered the service and who filed their own federal income tax at that time as an independent tax payer.
E1-E7	These questions should only be answered by individuals who do not meet the requirements outlined in Part B and were claimed as dependents by a parent or legal guardian at the time they entered the service.
Part F	This section is provided for you to add comments if you believe there is additional information the school should have to determine your residency at the time you entered the service.
Part G	This section must be read and signed by all individuals applying for an exemption.

Veterans

Hazlewood Exemption Residency Questionnaire

This form is only required for individuals whose place of entry into the service was NOT Texas, and who did NOT declare their Home of Record as Texas at the time they entered the service.

The Residency Questionnaire is NOT required for persons who answered "yes" to 8a or 8b.

Part A – Applicant Identification

1. Name: _____ 2. Social Security Number: _____
last, first, middle initial

Part B – High School Graduation or Receipt of GED

1. Did you graduate from a TX high school or receive a GED in TEXAS having lived in the state the 36 months leading up to graduation or receipt of the GED? [ ] yes [ ] no

2. Did you live in Texas the 12 months prior to enlistment? (The year prior to enlistment may include time enrolled in high school or completing the GED.) [ ] yes [ ] no

If you checked "yes" to BOTH questions, skip to **Part G**.

Part C – Dependency Information at the Time you Entered the Service

1. At the time you entered the service, which of the following circumstances applied to you?
   a. [ ] You filed your own federal income tax as an independent tax payer.
   b. [ ] You were claimed as a dependent by a parent or court-appointed legal guardian.
   c. [ ] If you did not check "a" or "b" above, who provided the majority of your support?
   [ ] self [ ] parent or guardian [ ] other*: _____

*Explanation for "other" person providing you support:
_____

if you checked "a" or "self" under "c", continue to **Part D.**
If you checked "b" or "parent or guardian" under "c", skip Part D and go to **Part E**.
If you checked "other", give explanation above, skip Part D and answer **Part E** for the individual who provided you support.

Part D – For those who filed their own income tax (checked "a" to question C, above)

1. Were you living in Texas when you entered the service? Yes___ No ___

2. If you WERE living in Texas when you entered the service,
   a. how long had you been living in Texas at that time? _____ Yrs & _____ Mos

   b. what was your main reason for being in Texas? (If "other" give explanation.)
   [ ] Born & Raised Here [ ] Go to College [ ] Accept a Job [ ] Military Assignment
   [ ] Other _____
   c. if you were here for military assignment, what was your home of record? _____

3. If you were not living in Texas when you entered the service, but still believe you were a Texas resident at that time,
   a. How long had you lived outside of TX when you entered the service? _____ Yrs & _____ Mos

   b. What was your reason for being out of state when you entered the service? (If "other", explain.)
   [ ] Go to College [ ] Accept a Job [ ] Military Assignment [ ] Other _____

   _____

Now skip **Part E** and Go to **Part F**.

Part E –Students Claimed by a Parent or Court-Appointed Legal Guardian when They Entered the Service. ***All students who answered "Parent" or "Legal Guardian" or "other" in Part C) must complete this section. Your answers should reflect the situation as it existed when you entered the service.***

1. Name of person who claimed you as a dependent: _____

2. Relationship to you: [ ] parent [ ] legal guardian [ ] other _____

3. Was your parent or legal guardian a U.S. Citizen or Permanent Resident? Yes [ ] No [ ]
   a. If no, which of the following categories did he/she meet at that time?
      i. [ ] Applicant for Permanent Resident Status.
      ii. [ ] Foreign National with a visa to live in the United States.
      If you checked this box, what type of visa is it? Visa type: _____
      iii [ ] Foreign National without a visa.

4. Did the parent or legal guardian live in Texas when you entered? Yes [ ] No [ ]

5. If he/she was living in Texas when you entered the service,
   a. how long had he/she been living in Texas at that time? _____ Yrs & _____ Mos

   b. what was his/her reason for being in Texas? (If "other" give explanation.)
   [ ] Born & Raised Here [ ] Go to College [ ] Accept a Job [ ] Military Assignment
   [ ] Other _____

   c. If Military Assignment, what was his/her Home of Record? _____

6. If he/she was not living in Texas when you entered the service
   a. How long had he/she lived outside of TX when you entered ? _____ Yrs & _____ Mos

   b. What was his/her reason for being out of state when you entered? (If "other", explain.)
   [ ] Go to College [ ] Accept a Job [ ] Military Assignment
   [ ] Other _____

   c. If Military Assignment, what was his/her Home of Record?_____

7. In which of the following categories did your parent or legal guardian fall?
   [ ] a. United States Citizen or Permanent Resident.
   [ ] b. Applicant for Permanent Resident Status.
   [ ] c. Foreign National with a visa to live in the United States.
   If you checked this box, what type of visa is it? _____
   [ ] d. Foreign National without a visa.

Part F - Comments

Is there additional information you believe your school should have in order to assess your residency at the time you entered the service?

Part G – Certification and Consent

My name is _____ and I am applying for an exemption from payment of tuition and certain fees under Texas Education Code, Section 54.203 (The Hazlewood Act). I understand that I may be entitled, under the law, to this exemption for up for 150 credit hours total at Texas public institutions of higher education. For the purpose of accounting for the total number of hours for which I receive this exemption, I am granting permission to any institution in which I have enrolled or will enroll to release current semester and historic credit hour information to the Texas Higher Education Coordinating Board ("Board") and am granting permission for the Board to share such data with any institution that I might attend. I hereby certify the information I have provided is true and correct. I understand that if I fail to provide accurate information, I may be required to reimburse the institution and penalties may be imposed.

_____ _____

Signature Date

After completing and signing this form, <u>submit it to your institution</u> along with the Hazlewood Exemption (Hazlewood Act) Application for Veterans who have never used the Exemption.

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Approved (initials): _____	TX Resident [ ] yes [ ] no