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Hazlewood Exemption Application Packet for Veterans who have Never Used the Exemption

Form HE-V and Instructions

Mail this application and all documentation to the Veterans' Education Office or the appropriate office at the institution. The institution will process your application accordingly. Do not mail 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
Have an honorable discharge or separation from service or general discharge/separation under honorable conditions.	N/A	DD214 shows character of service. The Hazlewood administrator will review this document.
Served during a relevant time in history and/or for at least 181 days (See list of Eligible Periods of Service, below).	N/A	DD214 shows dates of service and days of active duty. The Hazlewood administrator will review this document.
Not in default on a loan made or guaranteed by the state of Texas.	Question 5	Institution verification through national and state loan clearinghouses.
<p>If you are eligible for federal veterans' education benefits under Title 38, Chapter 33, the value of these federal tuition and fee benefits cannot exceed the value of the Hazlewood exemption (tuition and fees less deposit and student service fees). If you have served additional active duty since your discharge, your federal education benefits letter must be current (no more than 3 months old).</p> <p>Effective fall 2009, federal veterans' education benefits issued under CH30, CH31, CH35, 1606, 1607 may be used in conjunction with Hazlewood.</p>	Questions 6 and 7	<p>Benefit letter from VA Education Center in Muskogee, Oklahoma, 1-888-GI-Bill-1 or 1-888-442-4551 or www.gibill.va.gov .</p> <p>If the veteran has not served since 9/11, he/she does NOT have to provide a copy of his/her federal veterans' education benefits letter.</p> <p>If the veteran has served since 9/11, he/she IS required to provide a copy of his/her federal veterans' education benefits letter.</p>
<p>Eligible veterans must have met one of the following requirements <i>at the time of entry into the service</i>:</p> <ul style="list-style-type: none"> • Entered the service in Texas; • Declared Texas as home of record, <i>or</i> • Was a Texas resident. 	Question 8	<p>DD214 shows place of entry and Home of Record. The Hazlewood administrator will review this document.</p> <p>If the DD214 shows HOR was not Texas and Place of Entry was 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.</p>

Eligible Periods of Service

Texas Education Code 54.203 indicates the following individuals may be eligible for an exemption through the Hazlewood Act:

(A) nurses and honorably discharged members of the armed forces of the United States who served during the Spanish-American War or during World War I;

(B) nurses, members of the Women's Army Auxiliary Corps, members of the Women's Auxiliary Volunteer Emergency Service, and honorably discharged members of the armed forces of the United States who served during World War II except those who were discharged from service because they were over the age of 38 or because of a personal request on the part of the person that he be discharged from service;

(C) honorably discharged men and women of the armed forces of the United States who served during the Korean War which began on June 27, 1950, and ended on July 27, 1953; and

(D) all persons who:

(i) were honorably discharged from the armed forces of the United States after serving on active military duty for at least 181 days, excluding training; and

(ii) who served a portion of their active duty during:

(I) the Cold War which began on June 27, 1950;

(II) the Vietnam era which began on December 21, 1961, and ended on May 7, 1975;

(III) the Grenada and Lebanon era which began on August 24, 1982, and ended on July 31, 1984;

(IV) the Panama era which began on December 20, 1989, and ended on January 21, 1990;

(V) the Persian Gulf War which began on August 2, 1990, and ended on March 3, 1991;

(VI) the National Emergency by Reason of Certain Terrorist Attacks, which began on September 11, 2001; and

(VII) any future national emergency declared in accordance with federal law.

Instructions for Completing the Application.

A1-A4 Self-explanatory

A5 A veteran who is in default on an educational loan made or guaranteed by the State of Texas is not eligible to receive Hazlewood Act benefits. These loans include only the State loans; for example, the College Access Loan Program (CAL) program, 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, such as the Federal Perkins Loan Program, are not included. If you answer "yes" to this question, you cannot use the exemption. Your institution will verify your response to this question.

A6 To use the exemption, your federal veterans' education benefits that are used to pay only for tuition and fees (Chapter 33) cannot exceed the potential value of your Hazlewood exemption (tuition and fees other than property deposit and student service fees). To prove you meet this requirement you must provide your institution a copy of a letter from the VA Education Center in Muskogee, Oklahoma by calling 1-888-442-4551 indicating your current status with regard to federal veterans' education benefits or www.va.gov.

A7 If you have served any active duty since your discharge, you may be eligible for additional federal benefits. Therefore, we ask that you provide your institution a veteran's benefits letter that is dated no more than 3 months prior to the start of the term in which you wish to use the exemption.

If the veteran has not served since 9/11, he/she does NOT have to provide a copy of his/her federal veterans' education benefits letter.

If the veteran has served since 9/11, he/she IS required to provide a copy of his/her federal veterans' education benefits letter.

A8 You meet the program "time of entry" requirement if, at the time you entered the service, you:

- Entered in the state of Texas, or
- Declared Texas as your "home of record".

If you did not meet one of these service-entry requirements, you must prove you were a resident of Texas when you entered. (See question 9.)

A9 Skip this question if you answered "yes" to 8a or 8b.

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. If you answer "no" to this question and answered "no" to 8a and 8b, you are not eligible for Hazlewood. If you answered "yes" to this question and "no" to 8a and 8b, you must submit a copy of the Hazlewood Exemption Residency Questionnaire for Veterans when you submit this application.

Part B This section must be read and signed by all individuals applying for an exemption.

Documents to Submit.

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

1. **The Hazlewood Exemption Application for Veterans who have Never Used the Exemption (HE-V)**
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 both of these documents is to contact the VA regional office in Waco or Houston, whose addresses are:

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 veterans' education benefits (Ch 33) that you are receiving.

Obtain a benefits letter from VA Education Center in Muskogee, Oklahoma.
1-888-GI-Bill-1 or 1-888-442-4551 or www.gibill.va.gov

4. **Hazlewood Residency Questionnaire for Veterans** – ONLY if your answers to both 8a and 8b on the application were "no".



HAZLEWOOD EXEMPTION (HAZLEWOOD ACT) APPLICATION FOR VETERANS WHO HAVE NEVER USED THE EXEMPTION

Each veteran wishing to receive his/her first exemption through the Hazlewood Act (Texas Education Code 54.203) must complete and sign the following application and provide his/her institution documentation of eligibility as indicated in this application packet.

Part A – Basic Eligibility

1. Name: _____
last, first, middle initial
2. Social Security Number: _____
3. Address: _____
Street City State Zip Code
4. Term for which you are applying for the exemption: _____/
(fall/spring or summer) / year
5. Are you currently in default on an education loan made or guaranteed by the state of Texas?
 yes no NOTE: Your answer will be verified by your institution.
6. Are you currently eligible to receive veteran benefits under Title 38, United States Code, Chapter 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 either 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

If you answered "yes" to 8a or 8b, skip question 9 and go to Part B.

9. If you answered "no" to 8a and to 8b, were you a Texas resident when you entered the service?
 yes no

If you answered "no" to 8a, 8b, and 9, you are not eligible for a Hazlewood exemption.

If you answered "yes" to question 9, complete Part B and submit this form to your institution along with a completed copy of the Hazlewood Residency Questionnaire for Veterans, which was included in your application packet. The Residency Questionnaire is NOT required for persons who answered "yes" to 8a or to 8b.

Part B – 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 to 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, submit it to your institution. 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 amnt: \$ _____		Period of svce OK? [] yes [] no	In default? [] yes [] no
Place of entry TX? [] yes [] no	HOR Texas [] yes [] no	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.

- 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.

Hazlewood Exemption Residency Questionnaire For Veterans

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.

Do not complete this form if your place of entry or home or record at the time of entry was Texas.

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? Visa type: _____

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, submit it to your institution 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
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