

Sam Houston State University
A Member of The Texas State University System

FISCAL RESPONSIBILITY OF STUDENT ACCOUNTS FO-SFS-03

1. GENERAL

Sam Houston State University is committed to developing fiscally responsible business processes and practices that are both student-focused and fiscally responsible.

2. PURPOSE

2.01 The purpose of this policy is to:

- a. Outline the requirements for fiscal responsibility of student accounts, and
- b. Identify the remediation steps to be taken when accounts are unpaid.

3. GOOD FINANCIAL STANDING

3.01 A student is in good financial standing when:

- a. They do not have a past due balance for a prior or current academic term; or
- b. They are on a payment agreement and have been making consecutive monthly payments over the prior six (6) months.

4. STUDENT RECORDS

4.01 Student records include both paper and digital versions of:

- a. Official Transcripts
- b. Certificates and Diplomas
- c. Apostilles
- d. Letter of Intent
- e. Letter of Enrollment
- f. Letter of Non-Enrollment

5. HOLDING RECORDS

5.01 Student records may be withheld for the following financial reasons:

- a. Any account balance that is considered past due. (This may include but not be limited to balances held at collections, current term balance, and prior term balance)

5.02 Student records may be withheld for the following additional reasons:

- a. Student Life Holds (includes Discipline Meet and Bookstore holds)
- b. Property Holds associated with departments and specific departments such as Disability Office and Project Connect Office
- c. Financial Aid holds (includes Exit Counseling, Federal Grant Refund/Overpay, and Perkins Loan holds)
- d. Registrar Holds (Final Degree Requirements and Transcript-Returned Check Holds)
- e. Residence Life Holds

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RELEASE OF OFFICIAL TRANSCRIPT

6.01 Sam Houston State University will release Student's Official Transcript when the student meets one of the following criteria:

- a. Student is in good financial standing with the university;
- b. If Student is not currently enrolled in the institution as of the date of request:
 - i. Student participated in a balance consultation conference with the Office of Student Financial Services concerning any past due balance in which the student was afforded an opportunity to review all charges incurred and provide in writing any allegation of fraud, misconduct, or error by the University in the administration of a federal financial aid program;
 - ii. The University granted and Student accepted an offer to enter into a payment agreement; and
 - iii. The University informed Student of all consequences pertaining to the unpaid balance, to include possible submission to an outside collection agency and/or warrant hold placement with the State of Texas Comptroller's Office;
- c. When otherwise required by law; or
- d. Upon approval by the University President or the Chief Financial Officer and Senior Vice President for Operations..

6.02 The University will not withhold Student's Official Transcript related to a balance owed by Student found to have resulted from an error in the University's administration of a Title IV Higher Education Act program, or any fraud or misconduct by the University or its personnel.

Approved: June 25, 2024

Next Review: June 30, 2028