

Grant and Aid Processing Platform (GAPP) Training - Setting Up User Profiles

August 31, 2023

Topics of Discussion



**Overview of
GAPP**

User Roles

**Account
Creation**

**Approving &
Assigning
Roles**

**Account
Maintenance**

**Deadlines
&
Reminders**

Overview of GAPP

The New Grant and Aid Processing Platform:

- Will integrate most of our financial aid programs into ONE CENTRAL location
- Allows schools to:
 - Approve User Access Requests
 - Upload Documents
 - Request Payments
 - Monitor Program Spending
 - Submit Authority to Transfer Requests
 - Send inquiries directly to THECB



GAPP will go live with the following programs:

- TEXAS Grant
- TEOG
- TEG
- Educational Aid Exemption
- Bilingual Education
- State Work Study Programs



User Roles

User Roles



Primary Point of Contact (PPC)

Secondary Point of Contact (SPC)

Reporting Official (RO)

Business Office Contact (BOC)

Institutional Aid Administrator (IAA)

- ✓ Is granted access by THECB
- ✓ Grant/Remove access to users
- ✓ Can submit the yearly intent to participate
- ✓ Can submit and approve the following:
 - Transfer Requests
 - Return of Funds
 - Update Student Count
- ✓ Submit/Review help desk tickets

User Roles

Primary Point of Contact (PPC)



Secondary Point of Contact (SPC)

Reporting Official (RO)

Business Office Contact (BOC)

Institutional Aid Administrator (IAA)

- ✓ Can only be granted access by PPC
- ✓ Grant/Remove access to users
- ✓ Can submit the yearly intent to participate
- ✓ Can submit and approve the following:
 - Transfer Requests
 - Return of Funds
 - Update Student Count
- ✓ Submit/Review help desk tickets

User Roles

Primary Point of Contact (PPC)

Secondary Point of Contact (SPC)



Reporting Official (RO)

Business Office Contact (BOC)

Institutional Aid Administrator (IAA)

✓ Access is granted by PPC/SPC

✓ Can submit the following:

- Transfer Requests
- Return of Funds
- Update Student Count

✓ Submit/Review help desk tickets

User Roles

Primary Point of Contact (PPC)

Secondary Point of Contact (SPC)



Reporting Official (RO)

Business Office Contact (BOC)

Institutional Aid Administrator (IAA)

Details Staff List <u>Financial Aid Program</u> Intent to Participate Requests	
Showing 4 of 4 Items	
Program	Reporting Official
TEXAS Grant	Mary Luc
Bilingual Education	Mister Barry
Educational Aide Exemption	Isley
State Work Study Program	Luther

Note: Multiple RO's can be granted access, but only one per program.

User Roles

Primary Point of Contact (PPC)

Secondary Point of Contact (SPC)

Reporting Official (RO)



Business Office Contact (BOC)

Institutional Aid Administrator (IAA)

- ✓ Access is granted by PPC/SPC
- ✓ Can view the Institutional Profile and Allocations tiles in the portal
- ✓ Submit/Review help desk tickets

User Roles

Primary Point of Contact (PPC)

Secondary Point of Contact (SPC)

Reporting Official (RO)

Business Office Contact (BOC)



Institutional Aid Administrator (IAA)

- ✓ Access is granted by PPC/SPC
- ✓ Can view the Institutional Profile and Allocations tiles in portal
- ✓ Submit/Review help desk tickets

Primary Point of Contact (PPC) Account Creation

Account Creation Process for PPC



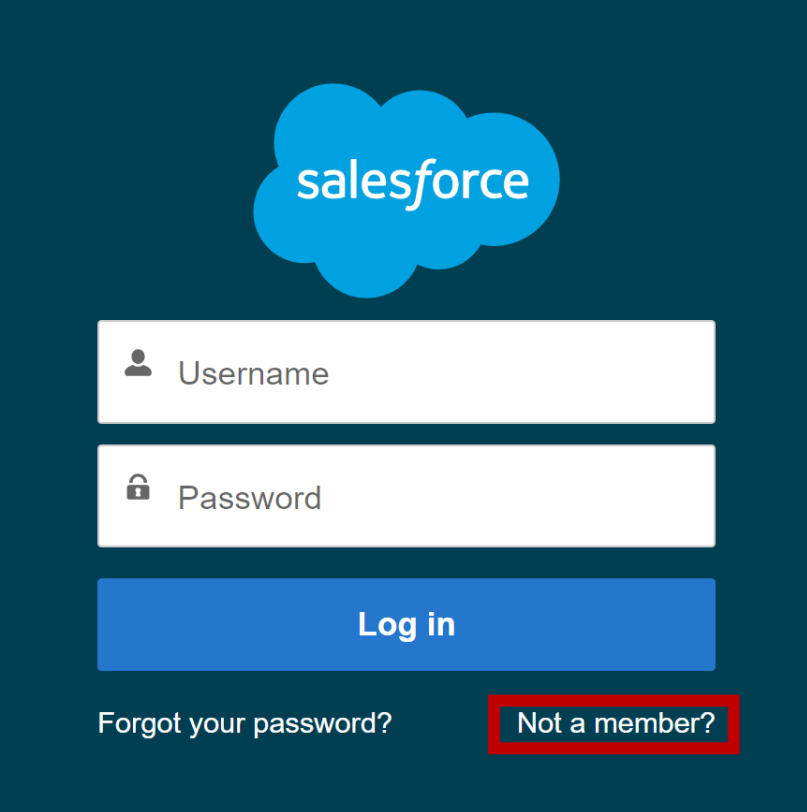
**Set up
account in
GAPP**

**Approve User
Role Access**

**Assign
Institutional Staff a
Role**

Account Creation Process for PPC

- An announcement with a link will be sent to the Financial Aid Directors to create a GAPP account.
- Financial Aid Directors will need to create an account by clicking on the “Not a member?” link.

A screenshot of the Salesforce login page. At the top is the Salesforce logo, which consists of a blue cloud shape with the word "salesforce" in white. Below the logo are two white input fields: the first is labeled "Username" with a person icon, and the second is labeled "Password" with a lock icon. Below these fields is a blue button with the text "Log in". At the bottom of the page are two links: "Forgot your password?" and "Not a member?". The "Not a member?" link is highlighted with a red rectangular border.

salesforce

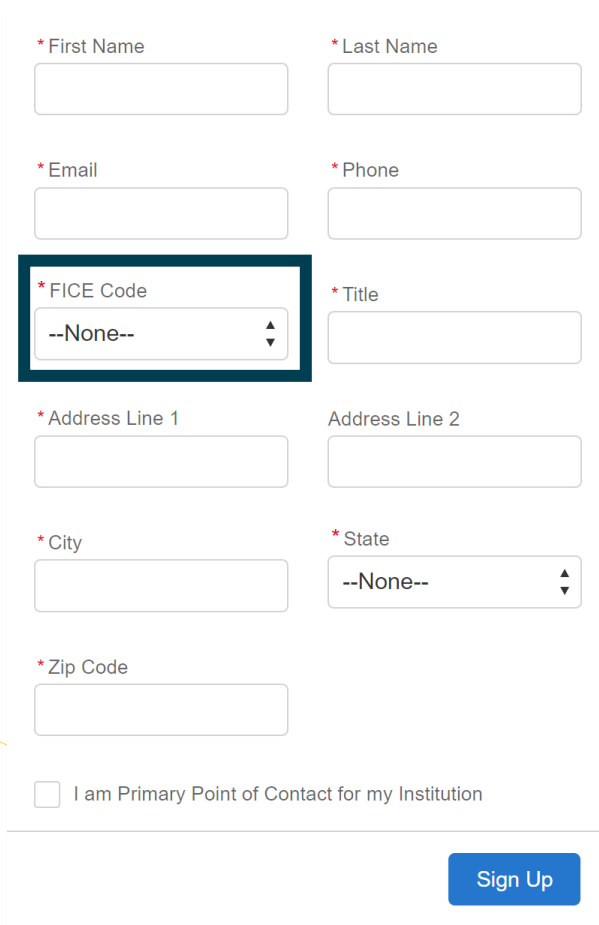
Username

Password

Log in

[Forgot your password?](#) [Not a member?](#)

Account Creation Process for PPC



* First Name

* Last Name

* Email

* Phone

* FICE Code

* Title

* Address Line 1

Address Line 2

* City

* State

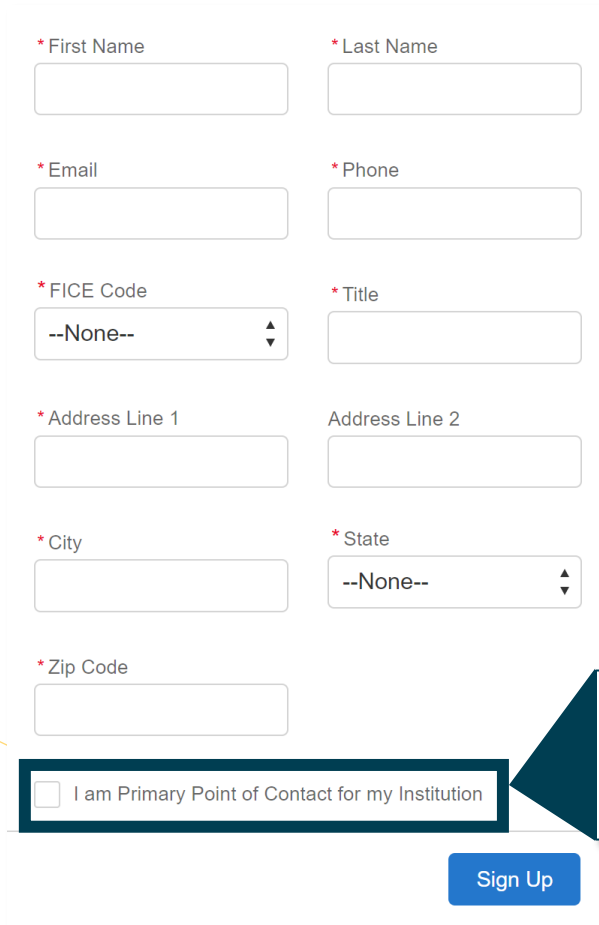
* Zip Code

☐ I am Primary Point of Contact for my Institution

[Sign Up](#)

- The Director will be prompted to fill out an account creation form.
- To be affiliated with the correct institution, select the FICE Code from the dropdown menu.
- To be granted access as the PPC, the “I am the Primary Point of Contact for my institution” checkbox must be checked.

Account Creation Process for PPC



* First Name

* Last Name

* Email

* Phone

* FICE Code

* Title

* Address Line 1

Address Line 2

* City

* State

* Zip Code

☐ I am Primary Point of Contact for my Institution

Sign Up

- The Director will be prompted to fill out an account creation form.
- To be affiliated with the correct institution, the corresponding FICE must be selected.
- To be granted access as the PPC, the “I am the Primary Point of Contact for my institution” checkbox must be checked.

☐ I am Primary Point of Contact for my Institution

Account Creation Process for PPC

Once the account creation form is submitted, THECB will review and process the request.

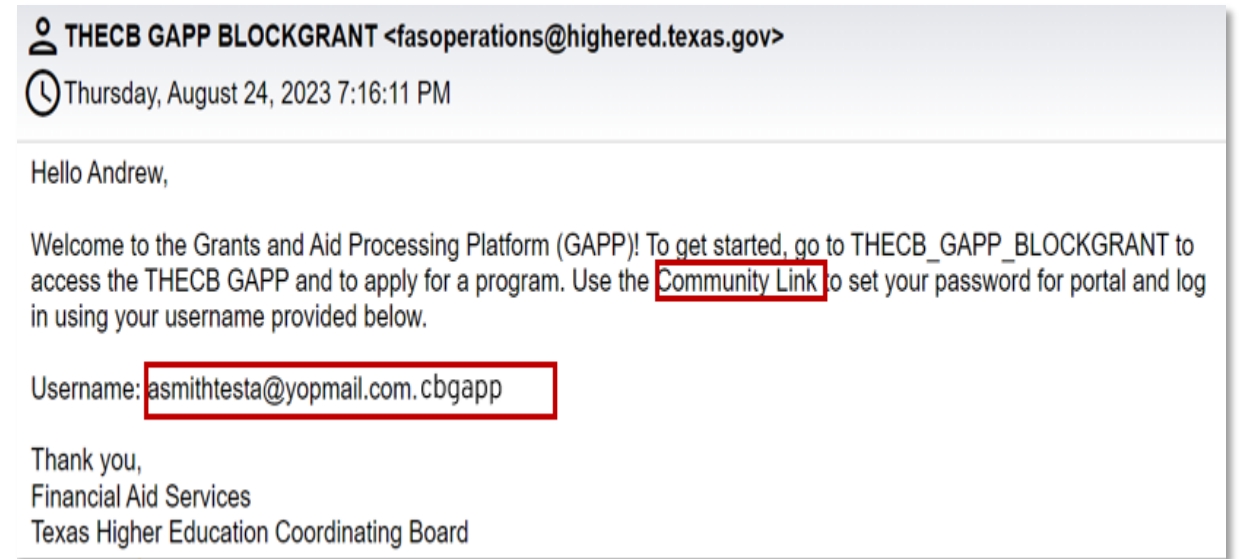
Success!

Your details have been submitted to THECB for approval.
You will receive a notification once the approval process is completed.

[Return To Login](#)

Account Creation Process for PPC

Once THECB approves the request, the PPC will receive an email with their account username and a password creation link.



Note: Username will be your email address with .cbgapp

Account Creation Process for PPC

Change Your Password

Enter a new password for
jgom2023test@yopmail.com.blockgrants. Make sure
to include at least:

- ☐ 14 characters
- ☐ 1 uppercase letter
- ☐ 1 lowercase letter
- ☐ 1 number
- ☐ 1 special character ⓘ

* New Password

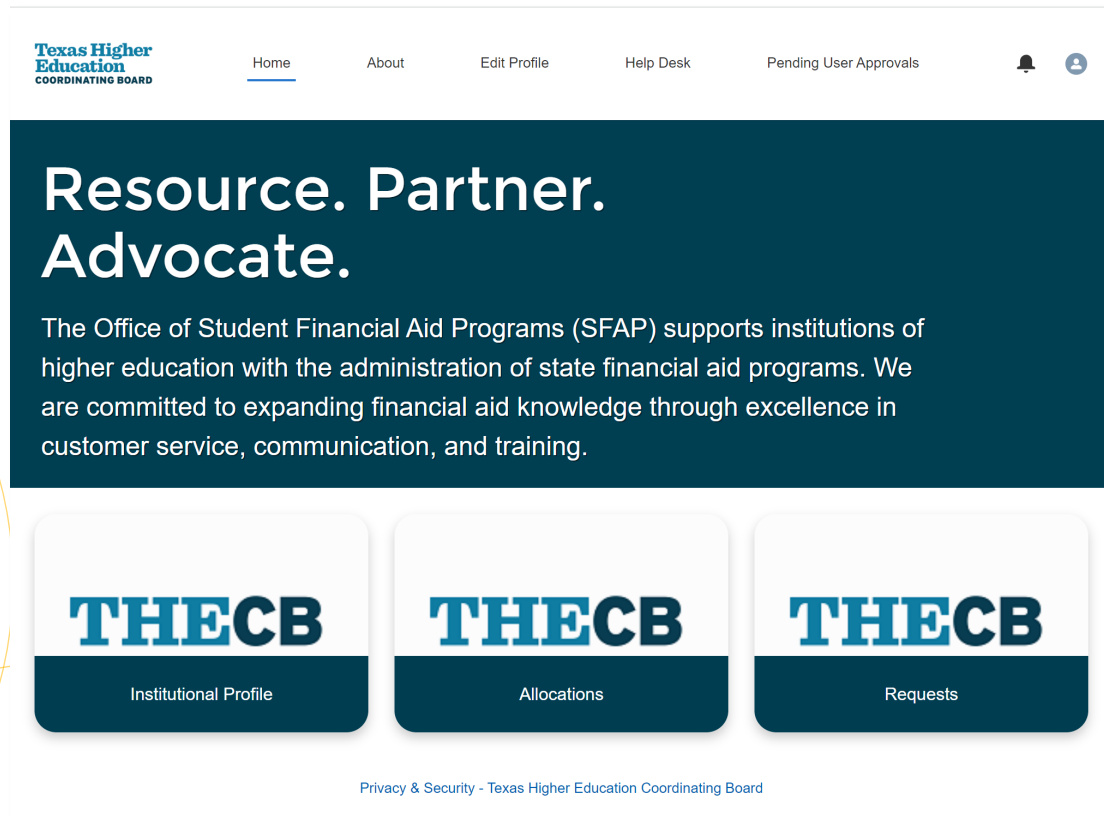
* Confirm New Password

Change Password

Password was last changed on 8/26/2023, 12:47 AM.

The PPC will be prompted to create a password after clicking on the community link.

Account Creation Process for PPC

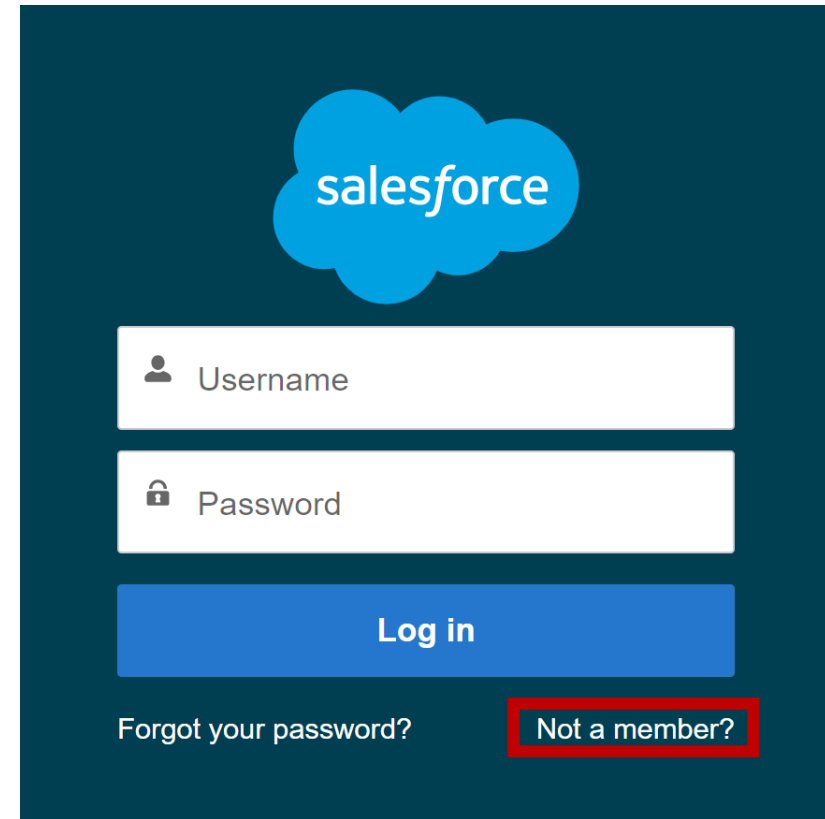


- The PPC will be directed to the GAPP landing page after creating a secure password.
- For a walkthrough of the GAPP portal, refer to [the SFAP webcast held on August 24, 2023.](#)

Institutional Aid Administrator (IAA) Account Creation

Account Creation Process for IAA

Institutional staff will need to access the GAPP link to create an account by clicking on “**Not a member?**”

A screenshot of the Salesforce login page. At the top is the Salesforce logo, which consists of a blue cloud shape with the word "salesforce" in white. Below the logo are two white input fields: the first is labeled "Username" with a person icon, and the second is labeled "Password" with a lock icon. Below these fields is a blue "Log in" button. At the bottom of the page, there are two links: "Forgot your password?" and "Not a member?". The "Not a member?" link is highlighted with a red rectangular border.

salesforce

Username

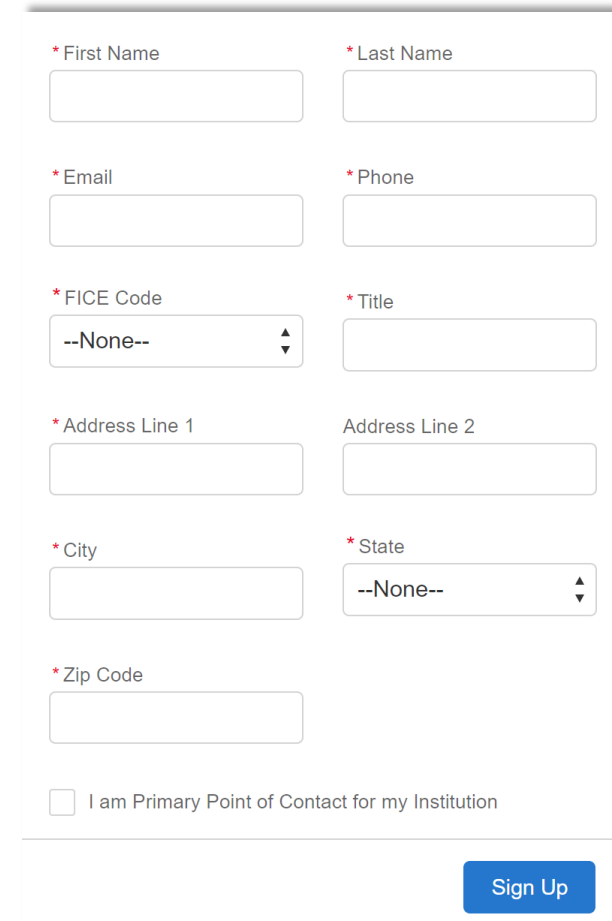
Password

Log in

Forgot your password? **Not a member?**

Account Creation Process for IAA

- Staff will need to create an account by filling out a short registration form.
- To be affiliated with the correct institution, select the FICE Code from the dropdown menu.
- To ensure access requests are routed to the PPC for approval, staff should **NOT** select the box indicating that they are the Primary Point of Contact.



A registration form for IAA account creation. The form is divided into two columns. The left column contains fields for First Name, Email, FICE Code (a dropdown menu with "--None--" selected), Address Line 1, City, and Zip Code. The right column contains fields for Last Name, Phone, Title, Address Line 2, and State (a dropdown menu with "--None--" selected). Below the form fields is a checkbox labeled "I am Primary Point of Contact for my Institution". At the bottom right of the form is a blue "Sign Up" button.

* First Name	* Last Name
<input type="text"/>	<input type="text"/>
* Email	* Phone
<input type="text"/>	<input type="text"/>
* FICE Code	* Title
--None--	<input type="text"/>
* Address Line 1	Address Line 2
<input type="text"/>	<input type="text"/>
* City	* State
<input type="text"/>	--None--
* Zip Code	
<input type="text"/>	
<input type="checkbox"/> I am Primary Point of Contact for my Institution	
<input type="button" value="Sign Up"/>	

Account Creation Process for IAA

Success!

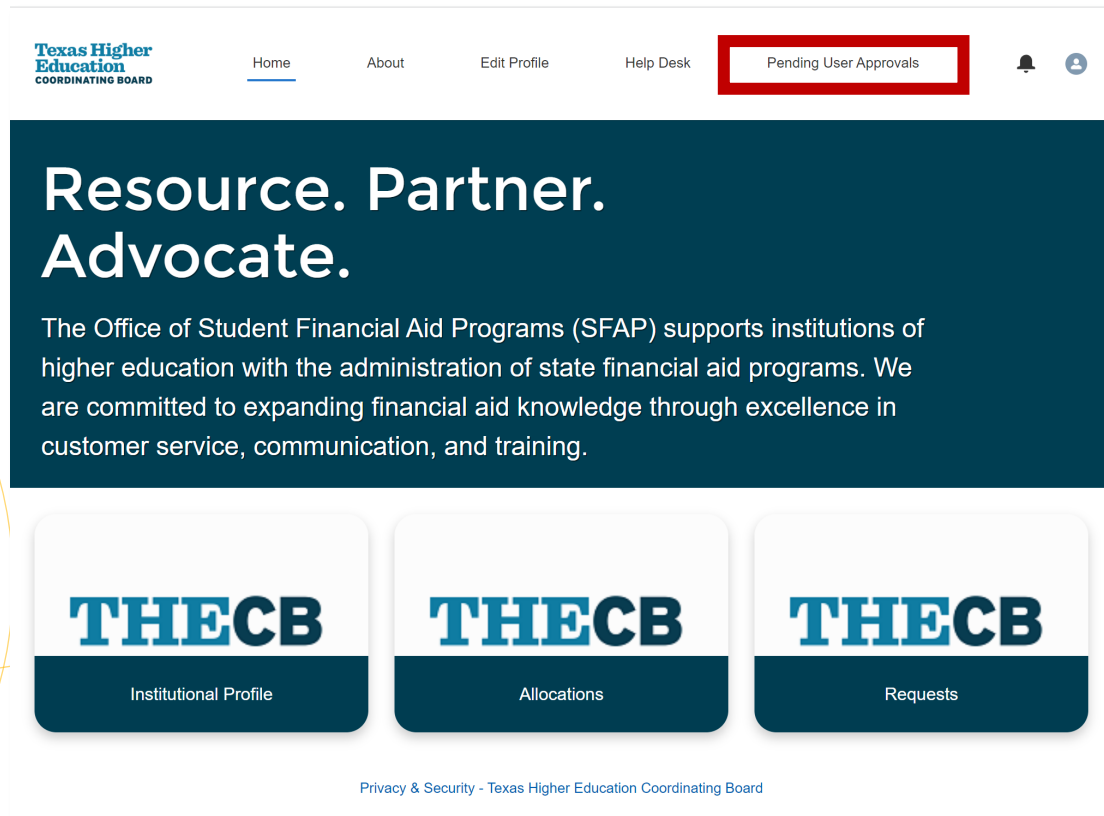
Your details have been submitted.

You will receive a notification once the approval process is completed.

[Return To Login](#)

Approving IAA Requests

Approval Process for IAA



- After the staff member submits a request for access, their request will automatically route to the PPC.
- Access should only be granted to staff who will be involved in the administration of the financial aid programs in GAPP.
- To view requests the PPC will need to log into GAPP and click on the “**Pending User Approvals**” section.

Approval Process for IAA

To access the pending request, click on the requestors name.

Texas Higher Education COORDINATING BOARD		Home	About	Edit Profile	Help Desk	Pending User Approvals			
---	--	------	-------	--------------	-----------	------------------------	--	--	--

Application For Profile Creation						
Name	Role	Phone	Email	Address	Status	
Scott	Institutional Aid Administrator	0000000000	smar2023test@yopmail.com	Test 00000000000000000000000000000000 TX 00000	Pending	

Approval Process for IAA

Once the PPC verifies the information entered on the request, they can approve or reject access.

Application For Profile Creation

First Name

Scott

Email

smar2023test@yopmail.com

Fice Code

010019

Address Line 1

Test

City

00

Zip Code

00000

Last Name

Martin

Phone

0000000000

Title

teSTING LN

Address Line 2

State

TX

Approve


Reject

Note: Do not inadvertently reject a user because the system cannot reinstate a user using the same unique email address.

Approval Process for IAA

If approved, the staff member will be sent an automated email with their username and a community link that will prompt them to create a secure password.

 **THECB GAPP BLOCKGRANT** <fasoperations@highered.texas.gov>

 Friday, August 25, 2023 4:14:10 PM

Hello Scott,

Welcome to the Grants and Aid Processing Platform (GAPP)! To get started, go to THECB_GAPP_BLOCKGRANT to access the THECB GAPP and to apply for a program. Use the [Community Link](#) to set your password for portal and log in using your username provided below.

Username: [smar2023test@yopmail.com .cbgapp](#)

Thank you,
Financial Aid Services
Texas Higher Education Coordinating Board

Assigning Institutional Roles

Assigning Roles

To assign the role of a Secondary Point of Contact (SPC) or Business Office Contact (BOC), the PPC will need to click on the respective buttons under the contact's profile.

Texas Higher Education COORDINATING BOARD

Home About Edit Profile Help Desk Pending User Approvals

Contact **Scott Martin** [Assign/Remove RO](#) [Assign/Remove SPC](#) [Assign/Remove BOC](#)

Account Name [UNIVERSITY OF TEXAS SOUTHWESTERN MEDICAL CENTER AT](#) Email smar2023test@yopmail.com

Name [Scott Martin](#) Email smar2023test@yopmail.com

Phone [\(000\) 000-0000](#) Title [teSTING LN](#)

FICE Code [010019](#) Address Line 1 [Test](#)

Account Name [UNIVERSITY OF TEXAS SOUTHWESTERN MEDICAL CENTER AT](#) Address Line 2 [Test](#)

Active ☒

Roles

Primary Point Of Contact ☐

Secondary Point Of Contact ☐

Business Office Contact ☐

Reporting Official ☐

Assigning Roles

After clicking on either the **Assign/Remove SPC** or **Assign/Remove BOC** buttons, the following window will appear. The PPC will need to select the box with the corresponding role and click on submit.

The screenshot displays the THECB website with a modal window titled "Assign/Remove SPC". The modal contains instructions: "Check the box below and click Submit to add the role to the user. Leave it unchecked to remove the role." Below this is a checkbox labeled "Secondary Point of Contact". A red box highlights the "Submit" button at the bottom right of the modal. In the background, a dropdown menu is visible with options "Assign/Remove SPC" and "Assign/Remove BOC", also highlighted with a red box. The website header includes the THECB logo and navigation links: Home, About, Edit Profile, Help Desk, and Pending User Approvals. The main content area shows a list of users with checkboxes for assigning roles.

Texas Higher Education
COORDINATING BOARD

Home About Edit Profile Help Desk Pending User Approvals

Assign/Remove SPC Assign/Remove BOC

Assign/Remove SPC

Check the box below and click Submit to add the role to the user. Leave it unchecked to remove the role.

☐ Secondary Point of Contact

Submit

☐ Primary Point of Contact
☐ Secondary Point Of Contact
☐ Business Office Contact
☐ Reporting Official

Assigning Roles

After the PPC assigns a role, the IAA will be granted the permissions for the corresponding role.

Contact
Scott Martin

Assign/Remove ROAssign/Remove SPCAssign/Remove BOC▼

Account NameUNIVERSITY OF TEXAS SOUTHWESTERN MEDICAL CENTER AT

Emailsmar2023test@yopmail.com

NameScott Martin

Phone(000) 000-0000

Emailsmar2023test@yopmail.com

TitleteSTING LN

▼ Roles

Primary Point Of Contact☐

Secondary Point Of Contact☒

Business Office Contact☐

Reporting Official☐

Assigning Roles

The Reporting Official (RO) Contact role process is slightly different; a program can only have one RO assigned to it.

Contact
Scott Martin

Assign/Remove ROAssign/Remove SPCAssign/Remove BOC▼

Account Name

Email
smar2023test@yopmail.com

Name
Scott Martin

Phone
(000) 000-0000

FICE Code
010019

Account Name

Active
☒

▼ Roles

Primary Point Of Contact
☐

Secondary Point Of Contact
☐

Business Office Contact
☐

Reporting Official
☐

Email
smar2023test@yopmail.com

Title
teSTING LN

Address Line 1
Test

Address Line 2

Assigning Roles

After clicking on the **Assign/Remove RO** button, the PPC will then be prompted to select which program(s) the IAA will be assigned as Reporting Official.

The screenshot shows a web application interface with a modal window titled "Assign/Remove RO". At the top of the page, there is a contact header for "Contact Scott Martin" and a navigation bar with buttons: "Assign/Remove RO" (highlighted with a red box), "Assign/Remove SPC", and "Assign/Remove BOC". The modal window contains the following elements:

- Assign/Remove RO** (Title)
- Instruction: "Check the box below and click Submit to add the role to the user. Leave it unchecked to remove the role."
- Select Programs** (Section Header)
- Two checkboxes:
 - ☒ Toward Excellence, Access, and Success Grant (TEXAS Grant)
 - ☐ Educational Aide Exemption
- Submit** (Blue button)

Below the modal, a list of roles is visible with checkboxes:

- ☒ Business Office Contact
- ☐ Reporting Official

On the right side of the modal, a list of email addresses is partially visible, including "@yopmail.com".

Assigning Roles

The IAA, PPC, and SPC will receive a confirmation email after a role has been assigned or removed.



Account Maintenance

Verifying Roles

The PPC/SPC can verify a user's access in the **Roles** section of the staff profile and make updates.

The screenshot displays the staff profile for Scott Martin. The left sidebar contains contact information: Name (Scott Martin), Phone ((000) 000-0000), FICE Code (010019), Account Name, and Active status (checked). The main content area features a 'Roles' section with four checkboxes: Primary Point Of Contact, Secondary Point Of Contact, Business Office Contact, and Reporting Official. A red rectangular box highlights the 'Roles' section in the sidebar, and a red L-shaped line points from this box to the 'Roles' section in the main content area.

Texas Higher Education
COORDINATING BOARD

Home About Edit Profile Help Desk Pending User Approvals

Contact
Scott Martin

Account Name

Name
Scott Martin

Phone
(000) 000-0000

FICE Code
010019

Account Name

Active
☒

▼ Roles

Primary Point Of Contact
☐

Secondary Point Of Contact
☐

Business Office Contact
☐

Reporting Official
☐

Deactivating Institutional Users

To deactivate a user, click on the menu expansion button on the right of the Contact profile and click on **Deactivate User**.

The screenshot shows a user profile for Scott Martin. The profile includes fields for Account Name (UNIVERSITY OF TEXAS SOUTHWESTERN MEDICAL CENTER AT), Email (smar2023test@yopmail.com), Name (Scott Martin), and Email (smar2023test@yopmail.com). A dropdown menu is open on the right, showing options: Assign/Remove RO, Assign/Remove SPC, Assign/Remove BOC, and Deactivate User. The Deactivate User option is highlighted with a red box. Below the profile, a modal titled "Deactivation confirmation" is displayed. The modal contains a warning icon and the text "Are you sure you want to deactivate the user?". At the bottom of the modal, there are two buttons: "No" and "Yes". The "Yes" button is highlighted with a red box.

Contact
Scott Martin

Account Name
UNIVERSITY OF TEXAS SOUTHWESTERN MEDICAL CENTER AT

Email
smar2023test@yopmail.com

Name
Scott Martin

Email
smar2023test@yopmail.com

Assign/Remove RO Assign/Remove SPC Assign/Remove BOC

Deactivate User

Deactivation confirmation

⚠ Are you sure you want to deactivate the user?

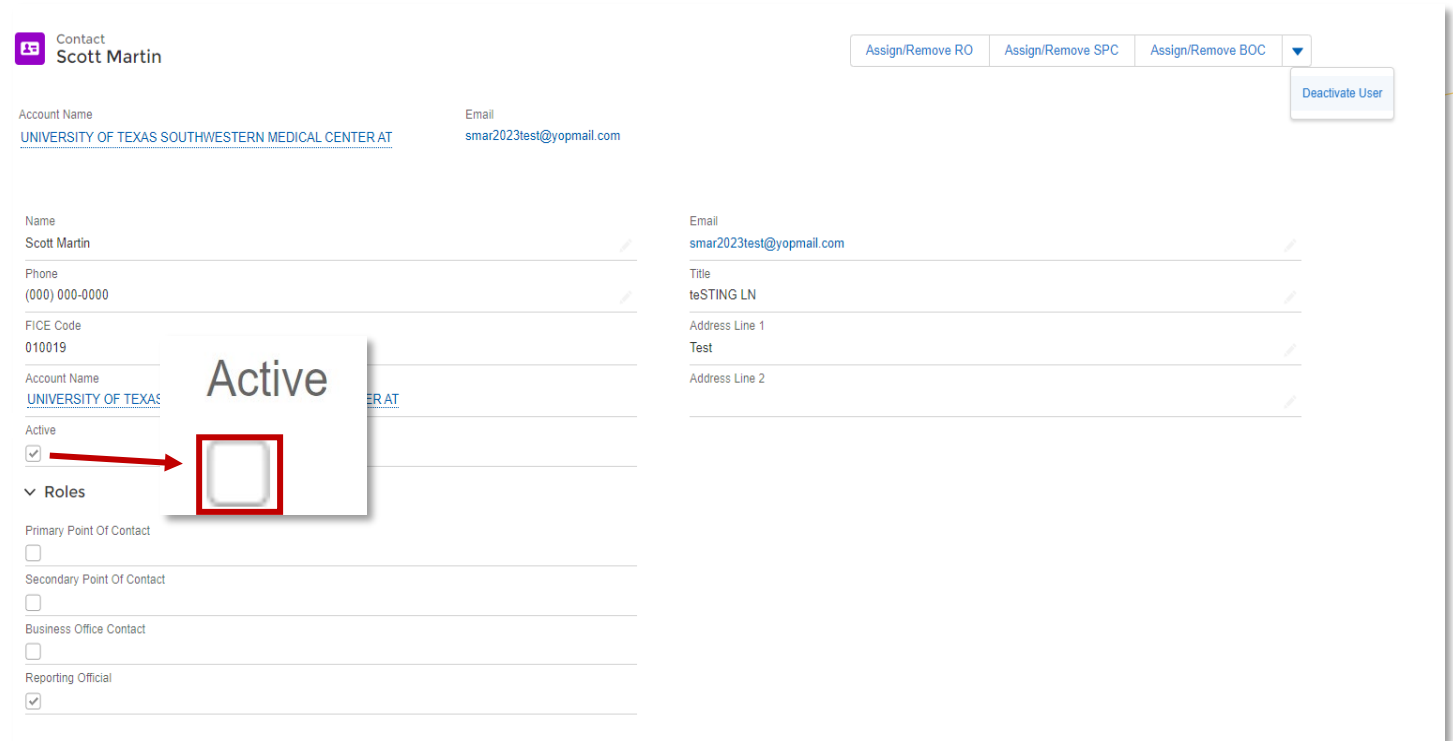
No Yes

Business Office Contact
☐

Reporting Official
☒

Deactivating User Accounts

Once a user has been deactivated, the Active field under the Contact Profile should be unchecked.



The screenshot shows the user profile for Scott Martin. The 'Active' checkbox is currently checked. A red box highlights this checkbox, and a callout box labeled 'Active' points to it. The 'Deactivate User' button is visible in the top right corner.

Contact
Scott Martin

Assign/Remove RO Assign/Remove SPC Assign/Remove BOC ▼
Deactivate User

Account Name
UNIVERSITY OF TEXAS SOUTHWESTERN MEDICAL CENTER AT

Email
smar2023test@yopmail.com

Name
Scott Martin

Phone
(000) 000-0000

FICE Code
010019

Account Name
UNIVERSITY OF TEXAS SOUTHWESTERN MEDICAL CENTER AT

Active
☒

Roles

Primary Point Of Contact
☐

Secondary Point Of Contact
☐

Business Office Contact
☐

Reporting Official
☒

Email
smar2023test@yopmail.com

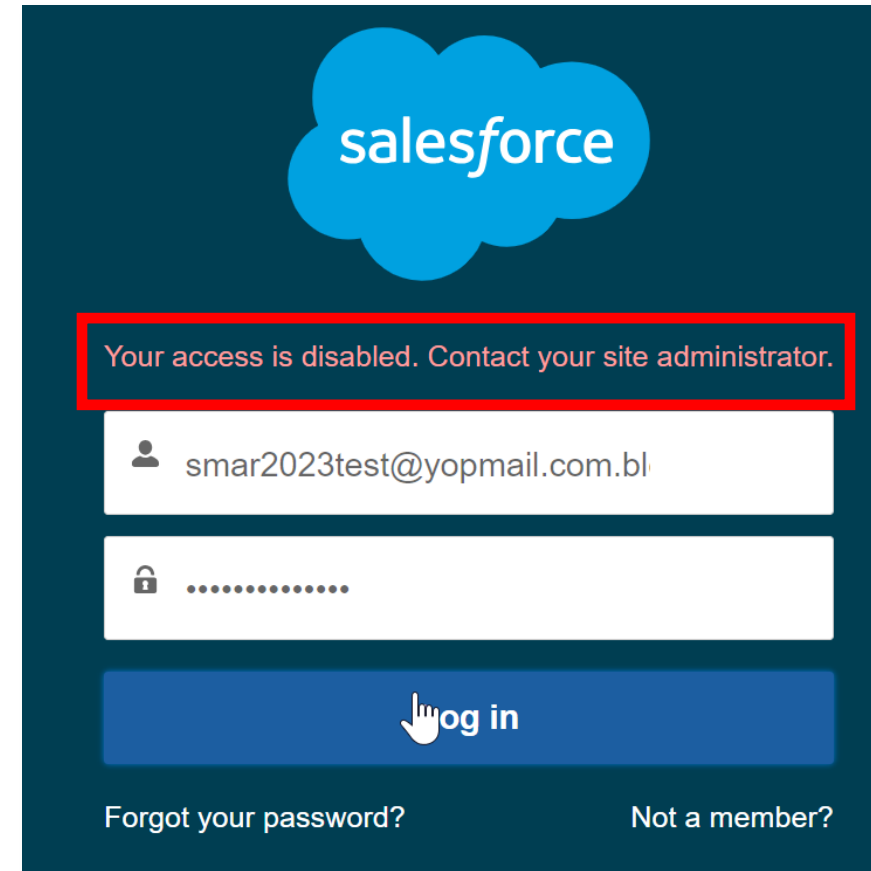
Title
teSTING LN

Address Line 1
Test

Address Line 2

Deactivating User Accounts

Once deactivated, the user will not be able to log into GAPP.



Deactivating PPC Accounts

Texas Higher Education
COORDINATING BOARD

User Access to Web Portals
To Be Completed by Director of Financial Aid

Purpose

The purpose of this form is to provide the requirements in which an institution may:

- Request, remove, and update credentials for the **Higher Education Loan Management System (HelmNet)**.
- Remove application access to the Grant Payment Program (GPP), Financial Aid Database (FAD), and the Good Neighbor Program (GNP) within the **Coordinating Board Identification (CBPass)** web portal.
- Update authorized **MOVEit DMZ** designees.

Requirements

Institutions must implement procedures to ensure that only authorized staff have access to the THECB secure web portals.

- Users are responsible for protecting the confidentiality of their usernames and passwords.
- User credentials for **CBPass** applications and **HelmNet** must be removed using this form whenever access is no longer needed (e.g., a role change, or a staff member's departure).
- Updates to contact information, such as a change in name, title, or email, must be made to a user's profile.
 - Changes to a user's profile in **CBPass** are made via the CBPass web portal.
 - Changes to a user's profile in **HelmNet** are made via this form.
- **MOVEit DMZ** is managed solely by the Director of Financial Aid, and institutions are issued only one ID and password. New directors are automatically designated the *Authorizing Official* of MOVEit DMZ. Directors are required to update the system password each time a new designee is assigned, a designee position no longer requires portal access, or a designee no longer works in the department or at the institution. Directors are required to assign *at least one* designee.

Institution Contact Information		
Institution Name:	FICE Code:	
Certifying Official (Director of Financial Aid or equivalent)		
First Name:	Last Name:	Phone:
Title:	Email:	

☐ Check box when a **NEW** or **Interim** Director is completing this form.

When the above box is checked, the THECB will remove the prior Director's access to all portals and automatically issue a new MOVEit DMZ password for security purposes.

Institution Authorization	
I certify that _____ shall implement procedures to ensure that only authorized users under this agreement have access to HelmNet, CBPass, and MOVEit DMZ web portals. I further understand that if a user no longer requires access, I will take the necessary measures to remove their access.	
Certifying Official Signature: _____	Date: _____

As of 05/12/2022 1 | Page

The User Access form must be completed to remove a current Director before THECB can add a new PPC.

Deadlines and Reminders

Deadlines and Reminders

Deadlines

August 31, 2023

- Deadline to log in to your HelmNet Account before deactivation
- Deadline to expend or return 2022-23 (FY23) TCWS funds

Reminders

- Comptroller Closure: August 31 through September 1, 2023
- Agency Closure: September 4, 2023
- Financial Aid Database FY23- Cycle Three
First day to submit file: September 20, 2023

Recent Notifications

- College Access Loan (CAL) Interest Rate Change Memo – dated 08/24/23
- Future Occupations & Reskilling Workforce Advancement to Reach Demand (FORWARD) Loan Interest Rate Change Memo - dated 08/24/23
- Fall 2023 Institutional Calendar - released 08/21/23

Contact Student Financial Aid Programs

FAS Contact Information for Institutions:

- FAS Institutional Phone Line
 - Institutions Only: (844) 792-2640

FAS Contact Information for the General Public:

- Texas Financial Aid Information Center Phone Line
 - General Public: (888) 311-8881

All can submit inquiries online through the [CONTACT US](#) web form.



**Phone Line
Hours of Operation:**
Mon-Fri
8 a.m. to 5 p.m.
(Closed daily
from 12 to 1 p.m.)

Submit a CONTACT US

To ensure inquiries are routed correctly, complete these steps:

- Select “**Institution**” in *Received From* box.
- Enter the institution’s full name.
- Always select “**Financial Aid Question**” as the Contact Reason.
- Describe your inquiry in 4000 characters or less.

Provide the best **direct phone number** to reach you.

Texas Higher Education Coordinating Board

Contact Us

An asterisk * by the field indicates a required field!

Received From*

INSTITUTION

Institution

Contact Reason*

*Financial Aid Question

Description*

4000 characters max

Please do NOT include your full Social Security Number inside the issue description. If you have a question about the status of a new loan application, accounts in repayment, or deferments, please use the last four digits of your SSN instead.

Is this a complaint

No ☒ Yes ☐

Contact Preference

E-MAIL ☒ LETTER ☐ PHONE ☐

Salutation*

Dr.

First Name*

Last Name*

E-mail*

Phone (10-digit)

Phone Ext

Mail Address

Mail Address2

Mail Address3

City

State

-- please select State --

Zip Code (5-digit)

Submit

|

[Help](#)



Texas Higher Education

COORDINATING BOARD

Thank You!