

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	
<p>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.</p>	
Certifying Official Signature: _____	Date: _____

Section I - Update MOVEit DMZ

MOVEit DMZ securely collects, stores, manages, and distributes FERPA-regulated information between an institution and the THECB. Authorized personnel can view, download, and submit files. **The designees assigned by the Director (two maximum) have the authority to reset the password, if needed.**

- If no updates are needed, **leave the designee sections blank.**
- Adding information in the designee boxes below will override any current designees the THECB has on file.
 - To request the current designees on file, submit an inquiry through [CONTACT US](#) (select “Financial Aid Question” as the Contact Reason).

	Job Title	First Name	Last Name	Email	Phone
Authorizing Official					
Designee #1					
Designee #2					

Section II - Request or Update HelmNet Access

HelmNet allows authorized personnel to update, certify, and run reports for the state programs CAL, BOT, and TASSP. **Only staff responsible for the administration of these programs and the certification of state loan applications should be granted access.**

- To request access for a new user, select the **New User** box and enter the user information.
- To update an existing user account, select the **Update** box and enter the updated user information. Then enter the user’s prior information in the row below.

Note: Directors are required to submit updated information for existing HelmNet users to keep THECB records current.

	Job Title	First Name	Last Name	Email	Phone
New User					
Update					
Prior Information					
New User					
Update					
Prior Information					
New User					
Update					
Prior Information					
New User					
Update					
Prior Information					

Section III - Remove Access to HelmNet or CBPass

Remove access to the HelmNet web portal and the following CBPass applications: Grant Payment Program (GPP); Financial Aid Database (FAD); and the Good Neighbor Program (GNP). **Directors are required to remove a user's access if no longer needed (e.g., a role change, or a staff member's departure).**

Application		System Identifying Information		Removal Reason
GPP <input type="checkbox"/>	GNP <input type="checkbox"/>	Email:		
FAD <input type="checkbox"/>	HelmNet <input type="checkbox"/>	Name:		
GPP <input type="checkbox"/>	GNP <input type="checkbox"/>	Email:		
FAD <input type="checkbox"/>	HelmNet <input type="checkbox"/>	Name:		
GPP <input type="checkbox"/>	GNP <input type="checkbox"/>	Email:		
FAD <input type="checkbox"/>	HelmNet <input type="checkbox"/>	Name:		
GPP <input type="checkbox"/>	GNP <input type="checkbox"/>	Email:		
FAD <input type="checkbox"/>	HelmNet <input type="checkbox"/>	Name:		
GPP <input type="checkbox"/>	GNP <input type="checkbox"/>	Email:		
FAD <input type="checkbox"/>	HelmNet <input type="checkbox"/>	Name:		

Submission Instructions

To submit this form for the **User Access Annual Review**, follow the steps below:

- **Step 1. Save** the completed form.
 - When saving, add your six-digit FICE code in the subject line.
 - Example: 012345_User Access Form Annual Review
- **Step 2. Upload** the completed form.
 - Use the [Online Verification Form](#) to upload a copy of the signed User Access Form for the THECB to process necessary changes.

For questions, contact Financial Aid Services at 844-792-2640 or through [CONTACT US](#) (select "Financial Aid Question" as the Contact Reason).