

TO: Directors of Financial Aid  
Texas Public and Private/Independent Institutions of Higher Education

FROM: DeChà Reid  
Senior Director, Financial Aid Services

DATE: May 17, 2022

RE: User Access Annual Review for Financial Aid Web Portals - 2022

For compliance and security purposes, institutions are required each year to verify the Texas Higher Education Coordinating Board's (THECB) list of designated portal users. Institutions transmit FERPA-regulated information with the THECB through three financial aid portals:

- Higher Education Loan Management System (HelmNet)
- Coordinating Board Pass (CBPass)
- MOVEit DMZ

**NOTE:** Portal accounts that have not been used in over 12 months will be deleted to ensure security. The Director of Financial Aid must submit a new user access form if the staff member requires access in the future.

**Financial Aid Directors** should follow these steps to complete the annual user access review process:

1. Review your institution's user accounts listed on the [User Access Spreadsheet](#) for the three web portals. Determine if updates are needed.
2. If updates are needed, complete a [User Access Form – Annual Review](#) reflecting the revisions to your institution's user accounts. Upload the completed form using the User Access Review - Online Verification Form in Step 3.
3. Complete and submit the required [User Access Review - Online Verification Form](#).

The deadline to complete the user access annual review is **June 10, 2022**.

Join a walk-through of the user access annual review process on **May 24, 2022, from 1:30-2:30 p.m. (CST)** during the May monthly webcast. Find more information on how to attend the webcast by visiting the [Stay Connected](#) webpage.

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