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TO: Directors of Financial Aid
        Texas Public and Private/Independent Institutions of Higher Education
FROM: DeChà Reid
        Director, Financial Aid Services

DATE: Oct. 15, 2020

RE: User Access to Web Portals Annual Review - 2020

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 Identification (CBPass)
- MOVEit DMZ

Financial Aid Directors should follow these steps to complete the annual User Access Review process:

Step 1. Review your institution's user accounts listed on the **User Access Spreadsheet** for the three web portals. Determine whether updates are needed.

Step 2. If updates are necessary, complete and submit a **User Access Form** reflecting the revisions to your institution's user accounts.

Step 3. After finishing steps 1 and 2, complete and submit the required **User Access Review and Verification Survey**.

The deadline to complete steps 1 through 3 is **Nov. 13, 2020.**

Join a walk-through of the User Access reconciliation process **Oct. 20, 2020, from 1:30-2:30 p.m.** during the October webcast training series. Find more information on how to participate by visiting the Stay Connected → **Webcast** webpage.

If you have questions, call Financial Aid Services at (844) 792-2640 or email **CONTACT US** (select "Financial Aid Question" as the Contact Reason).