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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: October 15, 2019

RE: User Access Portal Review - 2019

Each year institutions must conduct a User Access Review of the secure web portals that transmit FERPA-regulated information between institutions and the Texas Higher Education Coordinating Board (THECB). The main financial aid portals include:

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

For compliance and security purposes, each institution is required to verify the THECB's list of designated portal users. A [recorded webinar](#) is available to assist institutions with the review process. **Financial Aid Directors** should follow these steps to complete the annual User Access Review:

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. Complete and submit the required [User Access Verification Survey](#) to confirm that all users were reviewed.

Step 3. Submit a [System Authorization Form](#) for any updates to your institution's user accounts.

The deadline to complete steps one through three is **November 15, 2019**. For questions, contact Financial Aid Services at (844) 792-2640 or email UserAccess@theccb.state.tx.us.