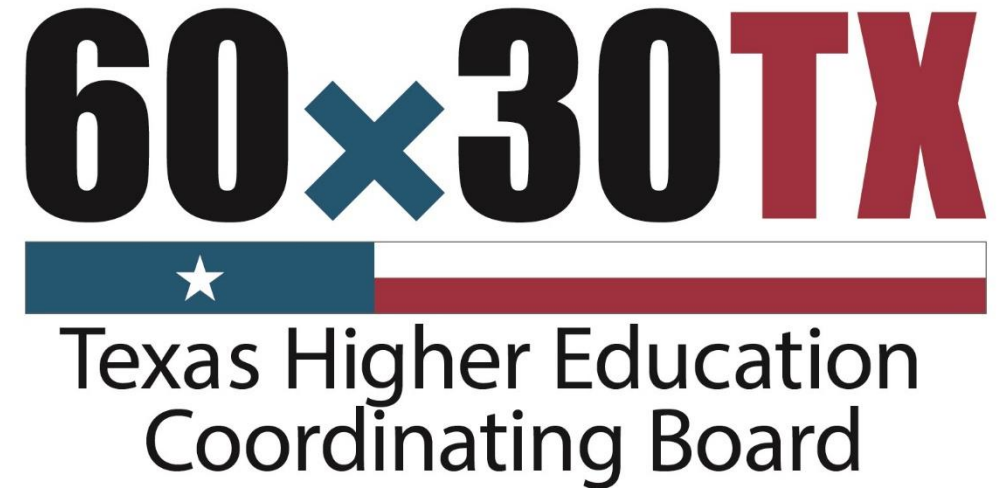


State Financial Aid Webcast

Leah Smalley
Student Financial Aid Programs
July 14, 2020



REPORT



2019-20 FADs Cycle Two

Online HelmNet Reporting

Reminders, Training, and Updates

Financial Aid Database (FAD) – Cycle Two

GENERAL INFORMATION

- Memo sent June 18, 2020
- 2019-20 Cycle Two opened **June 22, 2020**
- Revised FAD manual available on SFAP → Online Resources
- **Discard old copies of FAD manual**

IMPORTANT UPDATES

- Added “update symbol” to highlight edits made to the file layout.
- Updated the reconciliation report to reflect “Warning” for Cycle Two.
- Updated the Program Comparison report to reflect all financial aid programs.

Deadline to validate Cycle Two: August 28, 2020

Online HelmNet Reporting

Reporting Instructions



HelmNet Online Reporting

Student Financial Aid Programs
Texas Higher Education Coordinating Board

HelmNet Online Reporting

Purpose

The **Online Reporting** feature within the HelmNet portal provides institutions a secure method to run and export real-time data for the College Access Loan (CAL), Texas Armed Services Scholarship Program (TASSP), and B-on-Time (BOT) programs. Administrators can access program summaries as well as borrower-specific details from application to final disbursement.

Reports

Financial aid administrators with HelmNet permissions can run reports on each **Program Type**—CAL, TASSP, or BOT—for the selected **Program Year**. The program year is the state fiscal year (Sept. 1 through Aug. 31). Report data consist of student accounts with a loan period and date that falls within the selected program year. If an administrator were to run a report for Program Year 2021, the report results would include data from all student accounts that have a loan period end date between Sept. 1, 2020 and Aug. 31, 2021 (FY 2021).

Seven report options, referred to as **Report Names**, are available:

- Summary
- Disbursed
- Pending Future Disbursements
- Pending Disbursement—Need Documents
- Certified Applications in Process
- Certified—No Allocated Funds Available
- Pending School Certification

Accessing Reports

After logging into HelmNet, select **Loan Reporting** from the left-hand navigation. Then select the **School Loan Reports** button.

Use the drop-down arrows to select the report criteria:

- **Program year:** The state fiscal year (Sept. 1 through Aug. 31)
- **Report name:** 7 report options
- **Loan type:** CAL, BOT, or TASSP

Select the **Search** button to run the report. (You may see a circling icon; a typical search may take up to 60 seconds.)

System Tips

- For best results, use one of these internet browsers: Microsoft Edge, Google Chrome, Mozilla Firefox, or Safari. The reporting feature is not compatible with Internet Explorer.
- Do not use the "back" arrow in your browser; you could be logged out.
- If you are unable to view the left navigation, then zoom out.
- Your session will expire after 20 minutes of inactivity. An alert will pop up, and you will have 60 seconds to select "Extend" before the system ends your session and you must log in to HelmNet again.

Need access? Have your financial aid director submit the [System Authorization Form](#).
Questions? Email UserAccess@highereds.texas.gov

Reporting Features

All report results can be exported in three ways:

- .CSV/Excel file
- PDF
- Print

All reports except the Summary Report provide student-by-student data and include the following features:

- Display up to 100 results at a time
- Search for a specific student
- Sort data using the up-and-down arrows in the selected field

Administrators can access the **Borrower Summary** tab to review student-specific information related to the account.

- Access the Borrower Summary screen by selecting the borrower name.

System Tip

If you make and save any changes to student accounts, you must run the report again to see those updates.

Excel Tip

In the .CSV/Excel file, if you see "#####" symbols populating cells, expand each column to view the data.

Reporting Options

Seven report options available:

- Summary
- Disbursed
- Pending Future Disbursements
- Pending Disbursement–Need Documents
- Certified Applications in Process
- Certified–No Allocated Funds Available
- Pending School Certification

Pending School Certification Report

The **Pending School Certification Report** results include CAL applications awaiting certification by the institution.

- Student application documents and lender approval are complete.
- Loans not certified by the school within 365 days from the **Application Approved Date** are canceled.

Report Name: Pending School Certification - CAL

School Name: THECB UNIVERSITY (77777700)

Program Year: 2001

Report Run: 07/07/2020 6:58 PM

Show

50

 entries

Export to CSVExport to PDFPrint

Search:

Name	Loan Type	App Number	App Approved Date	Certified Amount	Requested Amount
APPLYTWICE, PUC	CL	1	06/23/2020	\$0.00	\$15,000.00
CAL, TEST	CL	1	06/23/2020	\$0.00	\$15,000.00

NOTE: Accounts listed on the report have a loan period end date within the selected program year. To view the account, select the student's name on the report to launch the Borrower Summary in a new tab.

FIELD NAME	FIELD DESCRIPTION
Reference Number	Student-specific identification number assigned by the THECB that can be used as an alternative to the student's SSN
SSN (social security number)	Last four digits of student social security number; or institution-assigned student ID number if student does not have an SSN
Name	Student last name, first name and middle initial
Loan Type	Program Type AS = Texas Armed Services Scholarship Program BT = Texas B-On-Time CL = College Access Loan
App (application) Number	A sequential number assigned to each application per student and program; each application number will display as a separate entry
App (application) Approved Date	Date the THECB approved the application
Certified Amount	Total dollar amount of funds certified by the school
Requested Amount	Total dollar amount of funds requested by the student

Running a Report

- **Program Type**

- College Access Loan (CAL), Texas Armed Services Scholarship Program (TASSP), and B-on-Time (BOT)

- **Program Year**

- The state fiscal year (Sept. 1 through Aug. 31)
- Report data consist of student accounts with a **loan period end date** that falls within the selected program year

Loan Period End Date Determines Program Year

Summer Example 1

- Header school
- Loan period is 6/20/20 – 8/25/2020
- Your system = FY 2021
- THECB = FY 2020 (9/1/2019 - 8/31/2020)

Summer Example 2

- Trailer school
- Loan period is 6/20/20 – 9/2/2020
- Your system = FY 2020
- THECB = FY 2021 (9/1/2020 - 8/31/2021)

NOTE: The disbursement date does not impact the program year.

HelmNet Reporting Browsers




The reporting feature is **not compatible** with Internet Explorer.

Compatible internet browsers:

- Microsoft Edge
- Google Chrome
- Mozilla Firefox
- Safari

Live Demonstration



Texas Higher Education
Coordinating Board

Login>Create Account


[Apply Online \ Continue App](#)
[Cosign a Loan](#)
[Loans on File](#)
[Login Tips](#)
[ACH Enrollment Tips](#)

Welcome

Welcome to the Texas Higher Education Coordinating Board

College Access Loan Interest Rate Reduction: Effective **July 1, 2020**, the College Access Loan (CAL) will carry a fixed interest rate of 4.20%. This rate only applies to new loans certified on or after July 1, 2020 and does not apply to existing loans. We recommend submitting your application **on or after July 1, 2020** to ensure that you receive the lower interest rate.

Important Coronavirus (COVID-19) Guidance: Last updated 04/09/2020 11:00 a.m.
Our primary focus at the Texas Higher Education Coordinating Board (THECB) is to ensure that borrowers who have been impacted by this health crisis receive assistance.
As we work to ensure the safety and health of our staff, we are committed to continuing service for our customers. Please be aware that you may experience a delay in our response. Please visit our "[COVID-19 Information](#)" page for more information.



HelmNet Access

Plan, Pay, & Complete College ▾Institutional Resources & Programs ▾Data & Reports

Public Community, Technical, & State Colleges

Public Universities & Health-Related Institutions

Private Postsecondary Institutions

Institutional Grant Opportunities

Funding & Facilities

Student Financial Aid Programs

Stay Connected

Program Resources

SFAP Frequently Asked Questions

Learning Resources


Online Resources

Reports

- [FY 2020 FAD Comprehensive Manual Reporting \[PDF\]](#)
- [FY 2019 FAD Comprehensive Manual Reporting \[PDF\]](#)
- [FY 2018 FAD Comprehensive Manual Reporting Cycle 3 \[PDF\]](#)
- [FY 2019 State Campus-Based Programs Annual Report \[PDF\]](#)

Forms

- [Authority to Transfer Form \[PDF\]](#)
- [Electronic Funds Transfer \(EFT\) – Wire Information](#)
- [FAD Reconciliation Form \[PDF\]](#)
- [Grants and Special Programs Online Return of Funds Form](#)
 - [Return of Funds Form Instructions \[PDF\]](#)
- [Loan Programs Online Return of Funds Form](#)
 - [Return of Funds Form Instructions \[PDF\]](#)
- Selective Service Statement of Registration Status
 - [English Statement \[PDF\]](#)
 - [Spanish Statement \[PDF\]](#)
- [System Authorization Form \[PDF\]](#)

System Authorization Form
Texas Higher Education Coordinating Board

This form should be completed by the Director of Financial Aid to add, update or remove user access to secure web portals managed by the Texas Higher Education Coordinating Board (THECB). These web portals allow staff at the institution to access to FERPA regulated information. For compliance and security purposes, institutions are required to ensure user access to these portals are accurate. User information should be reviewed and updated throughout the year.

SECURE WEB PORTALS

Higher Education Loan Management System (HELMNET) requires an individualized ID and password to access to electronic files created and maintained by THECB for those students who have applied for and received state-funded student loans. Users with access can update and certify state loan applications.

Coordinating Board Identification (CBPASS) requires an individualized ID and password to access the online funds request form and to search student award history for Toward Excellence, Access, and Success (TEXAS) Grant, Texas Educational Opportunity Grant (TEOG), and Tuition Equalization Grant (TEG). For adding and updating user access refer to the [CBPASS instructions](#).

MOVEit DMZ has one assigned user ID and password at each institution. MOVEit DMZ safely and securely collects, stores, manages, and distributes sensitive information between an institution and THECB. The Director of Financial Aid is the THECB point of contact for this portal. The Director can assign up to two designees at the institution that can request and reset login information.

INSTITUTION CONTACT INFORMATION

Institution Name	FICE Code
<input type="text"/>	
Director of Financial Aid Name	Phone
<input type="text"/>	<input type="text"/>
Email	
<input type="text"/>	

INSTITUTION AUTHORIZATION

I certify that shall implement procedures to assure 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.

Director of Financial Aid Signature: Date:

NOTE:
Compatibility issues with certain browsers may not allow the electronic version of this form to be submitted (including E-Signature). Forms that cannot be sent using the SUBMIT button on this form (see page 3) should be manually completed, scanned and emailed to Useraccess@theccb.state.tx.us.

<http://www.highered.texas.gov/institutional-resources-programs/student-financial-aid-programs/online-resources/>

Reminders & Updates

- Pending documents and refunds needed for Authority to Transfer should be submitted ASAP or by the deadline indicated in the follow-up notice.
- Preliminary Allocations for 2020-21 were completed and feedback is being reviewed.
- The TEG Engagement Guide for 2019-20 was released on June 23, 2020.
- The comprehensive program guidelines were released on June 23, 2020.
- This year the annual update of the Net Price Calculator will occur **Sept. 1, 2020**. Guidance will be released in the coming months.

Training

- Online HelmNet Reporting – Coming soon
- Monthly Webcast – **Aug. 11, 2020**

Contact Us

- Toll-free numbers are still unavailable.
- Send questions to [CONTACT US](#) and select “Financial Aid” as the Contact Reason.
- New domain name – higherred.texas.gov

Contacting Financial Aid Services

The THECB's customer phone lines are **unavailable** until further notice.

All inquiries must be submitted online through the **CONTACT US** web form.

- Loan reporting requests
- Loan processing changes
- State financial aid program eligibility questions

Texas Higher Education Coordinating Board

Contact Us

An asterisk * by the field indicates a required field!

Received From*

Institution

Contact Reason*

Description*

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*

First Name*

Last Name*

E-mail*

Phone (10-digit) Phone Ext

Mail Address

Mail Address2

Mail Address3

City

State Zip Code (5-digit)

| [Help](#)

Submitting 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**” for Contact Reason

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)

| [Help](#)

Stay Connected

Subscribe to the SFAP listserv, download SFAP published memos, and view the archive of Financial Aid Services monthly webcasts on the Stay Connected SFAP webpage.

Stay Connected

Recent Communications

- [04/06/2020 UPDATE: Selective Service Status Statement Requirement - New Guidance Memo \[PDF\]](#)
- [02/12/2020 Financial Aid Database \(FAD\) Reporting Cycle One 2019-20 \(FY 2020\) Memo \[PDF\]](#)
- [02/10/2020 B-On-Time \(BOT\) Loan Certification Deadline FY 2020 Memo \[PDF\]](#)
- [02/03/2020 College Access Loan \(CAL\) Opt-In/Opt-Out Form 2020-21 \(FY 2021\) Memo \[PDF\]](#)
- [02/03/2020 Texas State Financial Aid Opt-In/Opt-Out Form 2020-21 \(FY 2021\) Memo \[PDF\]](#)
- [02/03/2020 Good Neighbor Program 2020-21 \(FY 2021\) Memo \[PDF\]](#)
- [01/30/2020 Tuition Equalization Grant \(TEG\) Award Amounts for 2020-2021 \(FY 2021\) Memo \[PDF\]](#)
- [01/30/2020 Toward Excellence, Access and Success Grant and Texas Educational Opportunity Grant \(TEOG\) Award Amounts for FY 2020-2021 Memo \[PDF\]](#)
- [01/27/2020 State Financial Aid Resource Update Memo \[PDF\]](#)
- [12/20/2019 Financial Aid Database \(FAD\) Manual for FY 2020 Memo \[PDF\]](#)

Webcast

Join the Financial Aid Services (FAS) team for our monthly live informational webcasts.

STUDENT FINANCIAL AID PROGRAMS LISTSERV

Subscribe to receive memos, notifications, reminders and announcements through email.

CALENDAR OF PROGRAM DEADLINES

Download the Institutional calendar of events and deadlines to know what is coming up.

- [Institutional Financial Aid Calendar Summer 2020 \[PDF\]](#)
- [Institutional Financial Aid Calendar Spring 2020 \[PDF\]](#)
- [Institutional Financial Aid Calendar Fall 2019 \[PDF\]](#)

FINANCIAL AID ADVISORY COMMITTEE

Follow the Financial Aid Advisory Committee and provide the THECB with advice and evaluation of state financial aid programs for college students.

ARCHIVE MEMOS

Memos 2019 [Expand](#)

Memos 2018 [Expand](#)



Texas Higher Education Coordinating Board
Office of Student Financial Aid Programs

This list is intended to provide a communication medium devoted to the sharing of information about state-funded programs administered by Texas Higher Education Coordinating Board office of Student Financial Aid Programs. Subscriptions are authorized by the Coordinating Board and are limited to Texas public and private institutions of higher education.

First Name:	<input type="text"/>
Last Name:	<input type="text"/>
Affiliation/Institution:	<input type="text"/>
Title:	<input type="text"/>
Designated Program (Optional):	<input type="text"/>
Email:	<input type="text"/>
Phone Number:	<input type="text"/>
Address:	<input type="text"/>
City:	<input type="text"/>
State:	<input type="text"/>
Zip Code:	<input type="text"/>

☐ **Subscribe** I understand that my information will be stored and that periodic correspondence will be sent to the e-mail indicated.

☐ **Unsubscribe** I understand that my information will be deleted and I will no longer receive any correspondence from this listserv.

Contact Information and Feedback

Email: leah.smalley@highered.texas.gov

Webcast Survey: <https://www.surveymonkey.com/r/58YRM92>

Contact Us: <https://www1.thecb.state.tx.us/Apps/CRAFT/Home/Create>
(Select “Financial Aid Question” as the Contact Reason.)

Questions?