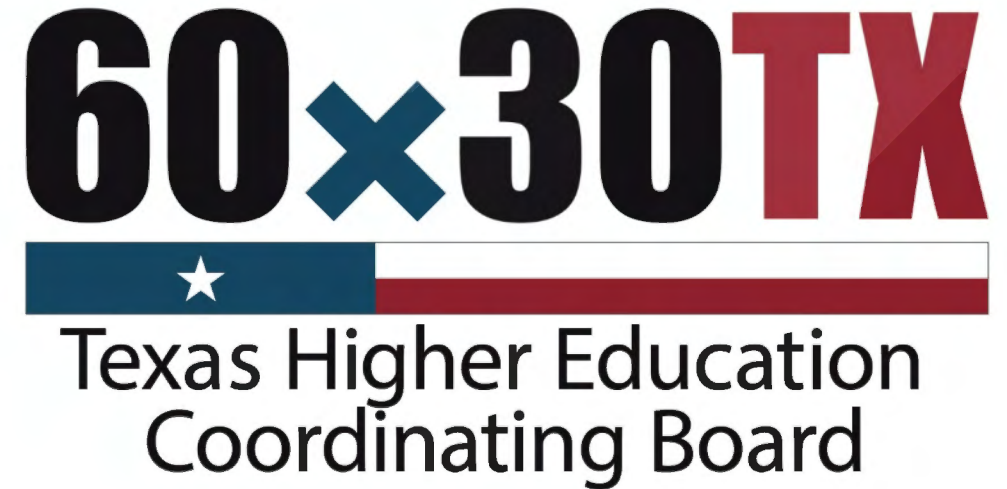


# TASSP & CAL Processing

Application to Disbursement

Leah Smalley  
Student Financial Aid Programs  
November 17, 2020



# Topics of Discussion



Program Resources

HelmNet Overview

Online Certification

Change Transactions

Questions?

# Program Resources

# Program Guidelines

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**Student Financial Aid Programs**

GEER State Grant and Emergency Educational Grant

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**Program Resources**

Exemptions and Waivers  
Grant Programs  
Loan Programs  
Tuition Set-Asides  
Work-Study & Scholarships

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# Program Resources




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- [HelmNet Online Reporting Instructions](#)
- [HelmNet Change Transactions Instruction Guide\\*\\*NEW\\*\\*](#)
- [B-On-Time loan FAQ](#)
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# Texas Armed Services Scholarship Program (TASSP)

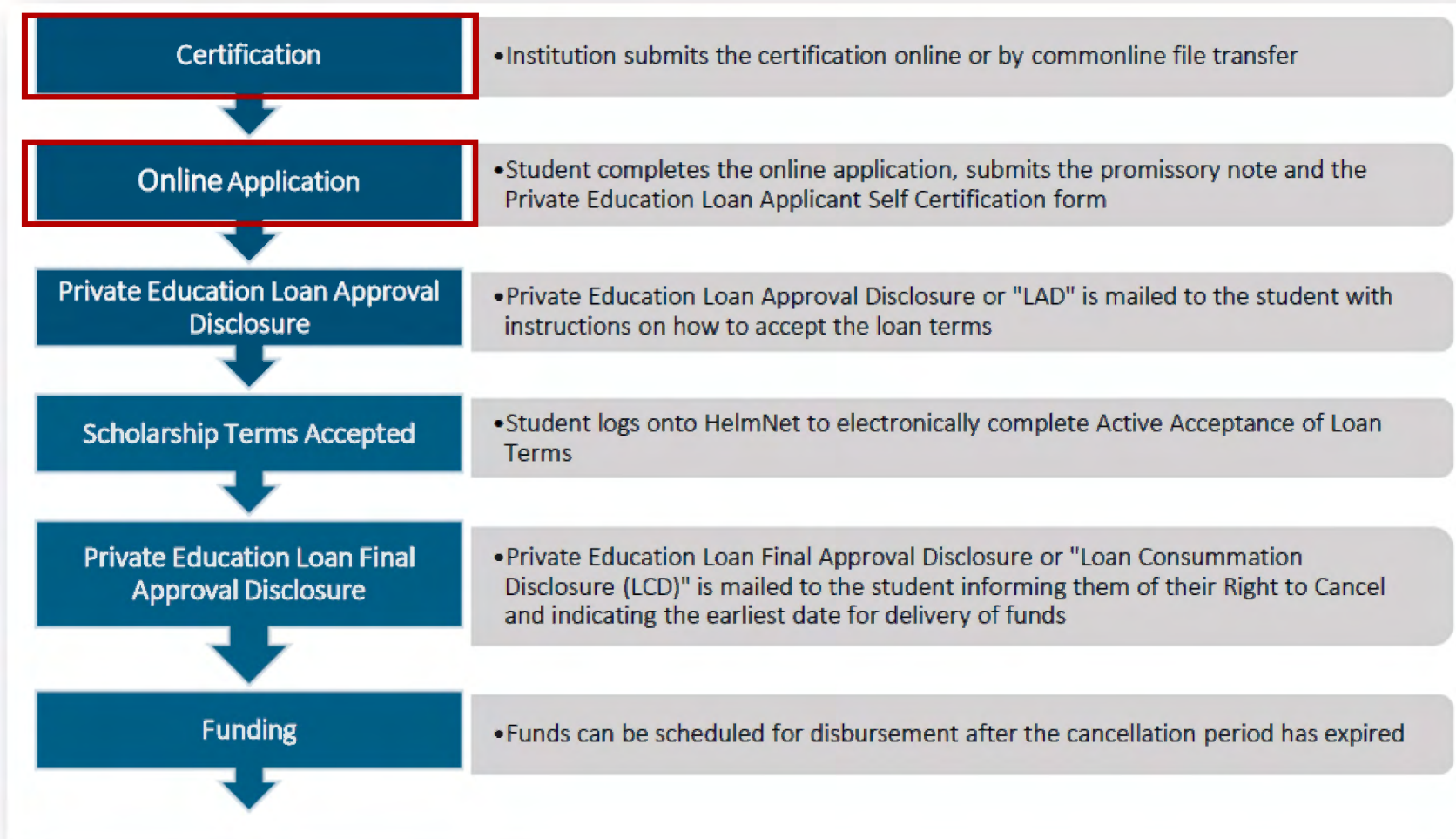
## **To receive TASSP award, a student must:**

- Be appointed for the scholarship by the governor, lieutenant governor, state senator, or state representative
- Be registered with Selective Service, or be exempt
- Be enrolled and in good standing in a Reserve Officers' Training Corps (ROTC), or another undergraduate officer commissioning program, as certified by the institution

# TASSP 2020-21 Annual Award Maximum

Institution Type	Annual Maximum
Public or Private Institution of Higher Education	\$10,000

# TASSP Process Flow



# College Access Loan (CAL) Program

## **To receive CAL, a student must:**

- Be classified by the institution as a Texas resident
- Be registered with Selective Service, or be exempt
- Be enrolled at least half-time
- Meet institutional satisfactory academic progress (SAP) requirements
- Receive a favorable credit evaluation\*

\*Borrower or co-borrower must have a minimum Experian VantageScore of 650 to receive credit approval.



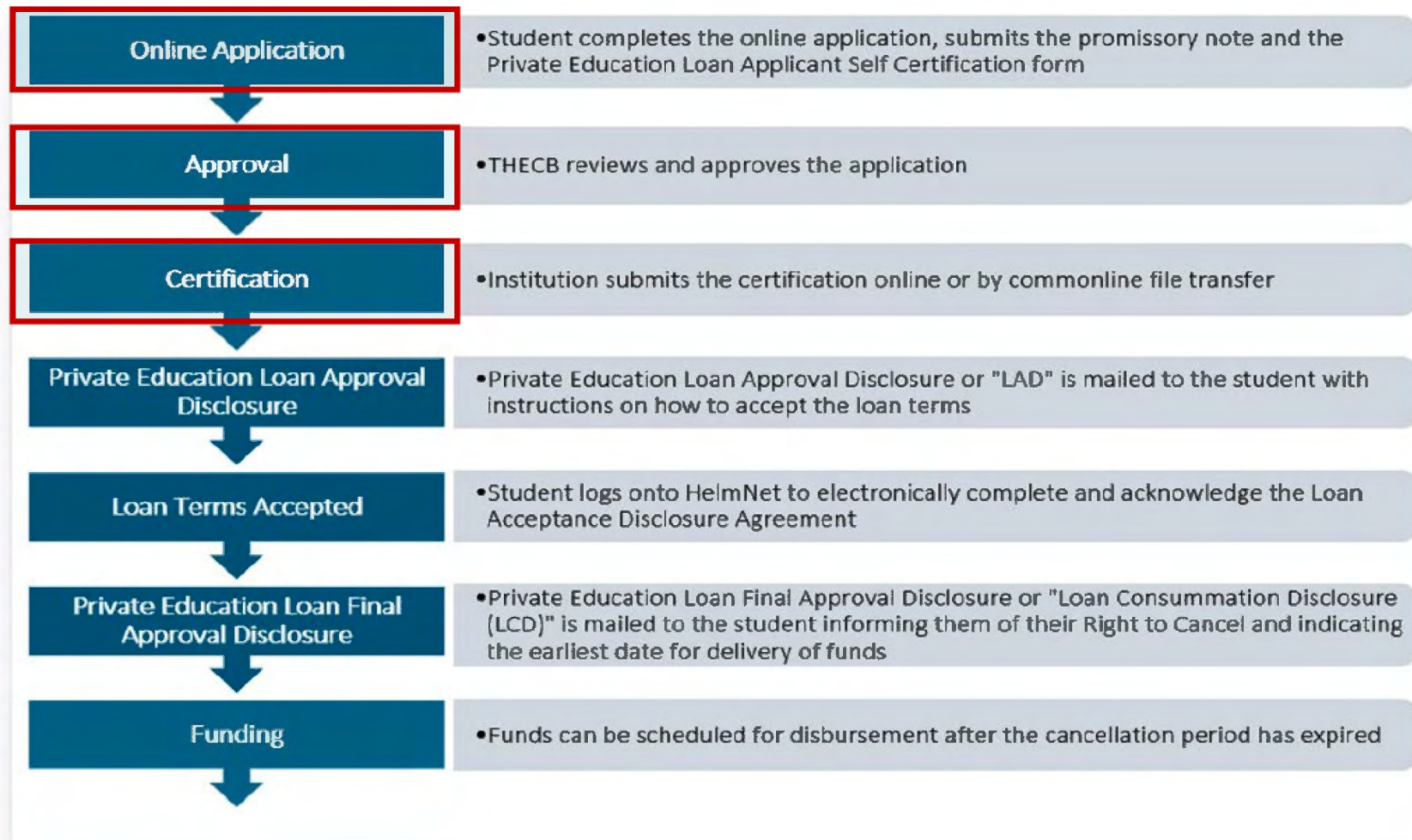
# CAL Certification Amount

When certifying a CAL, the loan:

- Must be \$100 or greater; and
- Must **not** exceed the difference between the student's COA and other forms of eligible financial assistance\*
  - “Free Aid” – grants, scholarships, and gifts
  - Federal Direct Loans (excludes PLUS)


\*FA must be deducted regardless of whether the student accepts the aid.

# CAL Process Flow



# HelmNet Overview

# HelmNet Login




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**CUSTOMER SATISFACTION SURVEY:** Take a moment to provide feedback.

# HelmNet Online Portal



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

**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 Online Portal

Account Login

Please enter your registered User Name and Password to view your loan(s), apply for a loan and/or cosign a loan online.

User Name

Password

Login

Create Borrower/Cosigner User Name

If you have not created a User Name and Password, click "Create Borrower/Cosigner User Name" to register.

Forgot Password/Unlock Account

If you forgot your password, or your account is locked, click "Forgot Password/Unlock Account". Instructions will be sent immediately to the e-mail you have on file. If you do not receive the e-mail, please contact THECB at 800.242.3062, or e-mail us.

Forgot User Name

If you forgot your user name click "Forgot User Name".

## Institutions must:

- Request a HelmNet account by submitting an online User Access Form.
- Call FAS for login assistance.

# Request User Access

The screenshot shows the 60x30TX website with a dark blue header containing navigation links: Plan, Pay, & Complete College, Institutional Resources & Programs, Data & Reports, Legislative & Media Resources, and About Us. A search bar is located on the right. The left sidebar lists various categories, with 'Program Resources' highlighted in a red box. The main content area features several sections: 'Program Resources' (highlighted in a yellow box), 'Net Price Calculator (NPC)', 'Comprehensive Program Guidelines', 'Web Portals', 'MOVEit DMZ', 'CBPass', 'HelmNet (HHLOANS)', and 'Coronavirus'. The 'Web Portals' section includes a link to the 'User Access Form'.

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Loan Programs  
Tuition Set-Asides  
Work-Study & Scholarships  
SFAP Frequently Asked Questions  
Learning Resources  
Title IX Training

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  - [FAD Reconciliation Form \[PDF\]](#)

### State Campus Based Programs

- [FY 2020 State Campus-Based Programs Annual Report](#)

## Net Price Calculator (NPC)

- [2020-21 State Net Price Calculator \(NPC\) Guidelines](#)
- [Institution Admin Tool](#)

## Comprehensive Program Guidelines

- [2020-2021 State Financial Aid Program Guidelines \[PDF\]](#)
- [2019-2020 State Financial Aid Program Guidelines \[PDF\]](#)

## Web Portals

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## MOVEit DMZ

- [MOVEit DMZ Login](#)
- [MOVEit DMZ User Guide \[PDF\]](#)

## CBPass

- [CBPass Login](#)
- [CBPass Quick Start Guide](#)
- [CBPass Administrator Guide](#)

## HelmNet (HHLOANS)

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- [HelmNet Online Reporting Manual \[PDF\]](#)

## Coronavirus

The THECB has created a dedicated webpage for [coronavirus information](#) relevant to higher education stakeholders.

Visit the [Coronavirus Frequently Asked Questions \(FAQs\)](#) webpage to get guidance on: Tuition, Refunds, and Financial Aid.

# HelmNet User Access



## User Access to Web Portals To Be Completed by Director of Financial Aid

### 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:
Title:	Phone:
Email:	
<input type="checkbox"/> 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	
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.	
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.**

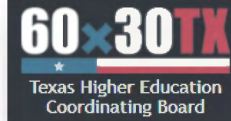
- To request access for a new user, select the **New User** box and enter the user information.
- To update an existing user account, select the **Update** box and enter the updated user information. Then enter the user's prior information in the row below.

**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 <input type="checkbox"/>					
Update <input type="checkbox"/>					
Prior Information					
New User <input type="checkbox"/>					
Update <input type="checkbox"/>					
Prior Information					
New User <input type="checkbox"/>					
Update <input type="checkbox"/>					
Prior Information					



# HelmNet Navigation



## THECBUniv

Change  
Password Logout

### New School Certification

#### Inquiry

Application Query  
Borrower Query  
Loan Query  
Disbursal Query  
Loan Reporting  
Login Tips  
ACH Enrollment Tips

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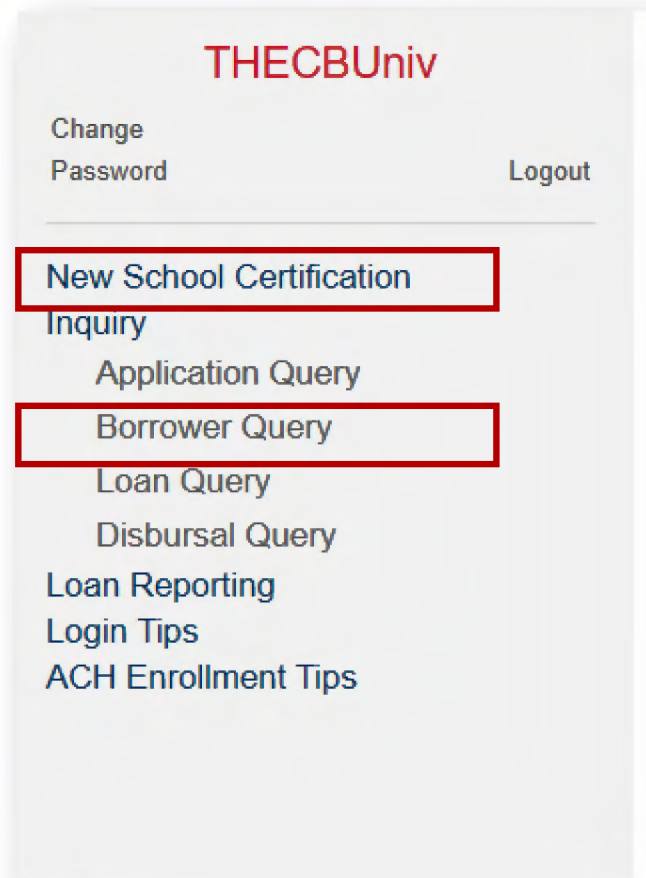
As we work to ensure the safety and health of our staff, we are committed to continuing service for our customers. Please be aware that you may experience a delay in our response. Please visit our [COVID-19 Information](#) page for more information.



Texas Higher Education Coordinating Board

[Contact Us](#) | [THECB Home](#) | [HHLloans Home](#) | [Privacy and Security Policy](#) | [Compact with Texans](#)

# HelmNet: New School Certification

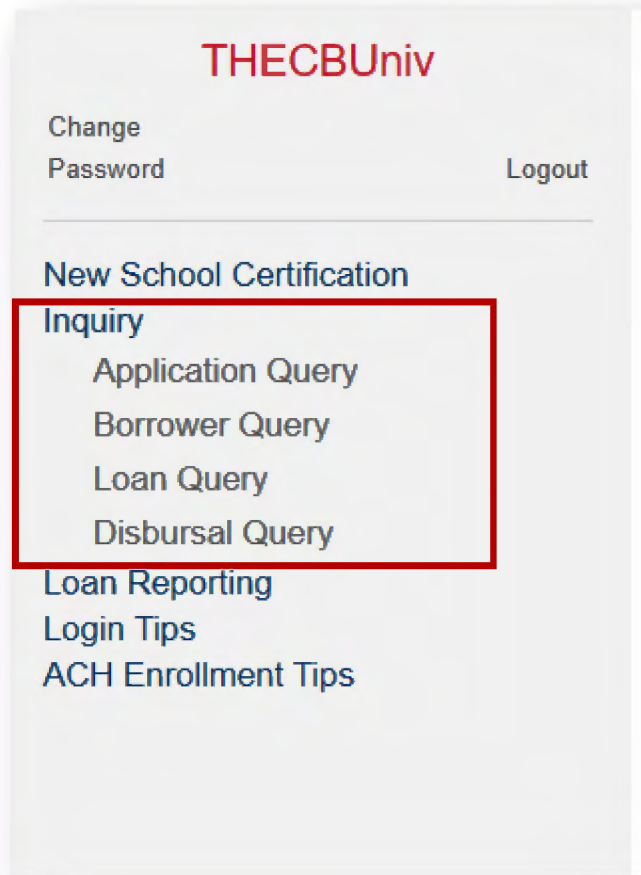


## New School Certification Link:

- ✓ TASSP Program **Only**
- ✓ CAL is certified by doing a Borrower Query



# HelmNet: Inquiry



## **Application Query:**

- ✓ Helps identify incomplete applications.

## **Borrower Query:**

- ✓ Helps identify applications and loans/scholarships associated with a student.

## **Loan Query:**

- ✓ Helps identify loans/scholarships by status.

## **Disbursal Query:**

- ✓ Helps identify loans/scholarships disbursements on Hold/Release.

# HelmNet: Loan Reporting

**THECBUniv**

Change Password

Logout

New School Certification Inquiry

Application Query

Borrower Query

Loan Query

Disbursal Query

Loan Reporting

Login Tips

ACH Enrollment Tips

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**Manage Loan Programs**

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- [HelmNet Online Reporting Instructions](#)
- [HelmNet Change Transactions & User Access Forms](#)
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**CUSTOMER SATISFACTION SURVEY:** Take a moment to provide feedback.

# HelmNet: Tips



## Login and ACH Enrollment:

- ✓ These links are tips for students and co-signers
- ✓ Call FAS for login assistance

# Online Certification

# TASSP Certification

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Logout

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Application Query

Borrower Query

Loan Query

Disbursal Query

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New School Certification

School Certification

**School Initiated Loan Application**


To start a new school initiated loan application, you must first lookup the borrower's demographic information by entering the information below. If found, the borrower demographics will be populated. If not found, you will be required to enter the information for the school certification.  
For CAL loans, the student must complete their application prior to your certification.

**Borrower SSN**

Lookup Borrower Demographics



# Student Information

<b>Borrower Information</b>	
<b>First Name</b>	<input type="text" value="Mickey"/>
Middle Initial	<input type="text"/>
<b>Last Name</b>	<input type="text" value="Mouse"/>
<b>Date of Birth</b>	<input type="text" value="10/18/1985"/> 
<b>SSN</b>	<input type="text" value="***-**-1111"/>
<b>Street Address 1</b>	<input type="text" value="1234 Disney Land Lane"/>
Street Address 2	<input type="text"/>
<b>City</b>	<input type="text" value="Disney City"/>
<b>State</b>	<input type="text" value="Texas"/> ▼
<b>ZIP</b>	<input type="text" value="78888"/> - <input type="text"/>





<b>Loan Application Type</b>	<input checked="" type="radio"/> Texas Armed Services Scholarship Program (TASSP) Loan Application
------------------------------	--

# Enrollment Information

Enrollment Information	
School Name	<input type="text"/>
Grade Level	Sophomore
Enrollment Status	Full-Time
Academic loan period	08/24/2020 to 05/21/2021
Anticipated Graduation Date	05/21/2021

Financial Aid Information	
Cost of Attendance	20000
Estimated Financial Aid	6000
Certified Loan Amount	10000

# Disbursement Information

Disbursal Information	
Number of Disbursals	<input type="text" value="2"/>
Disbursal 1 Date	<input type="text" value="11/27/2020"/> 
Disbursal 1 Amount	<input type="text" value="5000"/>
Disbursal 2 Date	<input type="text" value="01/22/2021"/> 
Disbursal 2 Amount	<input type="text" value="5000"/>
Disbursal 3 Date	<input type="text"/> 
Disbursal 3 Amount	<input type="text"/>
Disbursal 4 Date	<input type="text"/> 
Disbursal 4 Amount	<input type="text"/>

# Certification

## Certification

I have applied or cause to have applied the rules of the Texas Armed Services Scholarship Program and certify the following, to the best of my knowledge:

1. The borrower named on this application is an eligible student in accordance with the Texas Armed Services Scholarship Program rules,
2. The borrower is not incarcerated,
3. The borrower is eligible for a conditional scholarship in the amount certified,
4. The disbursement schedule complies with the requirements of the Texas Armed Services Scholarship Program,
5. Based on records available and inquiry made the borrower is not liable for an overpayment on any state or federal grant,
6. The information provided is true, complete, and accurate,
7. The borrower's request for the conditional scholarship can be evidenced in our Financial Aid Office by the borrower's active OR passive confirmation of our offer of the proposed loan amount.

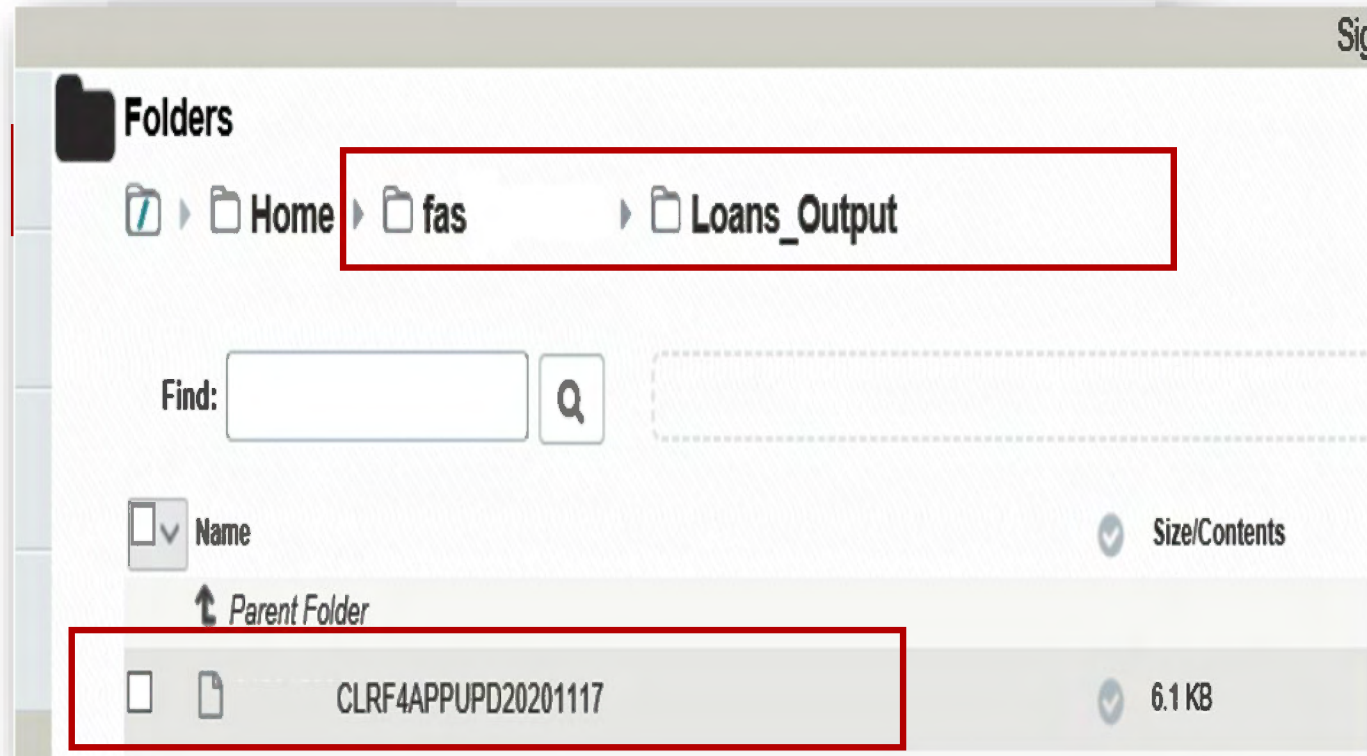
The amount of this conditional scholarship may not exceed the difference between the cost of attendance and other forms of student assistance for which the student may be eligible. Other sources of student assistance include gifts, grants, scholarships, federal Perkins loans (to the extent that your institution has available Perkins funds), and Stafford loans (subsidized and unsubsidized), but not federal PLUS loans. The amount of this conditional scholarship is also to be reduced by any amount paid to a student by a branch of the armed forces of the United States during the academic year.

☒ Certify

Submit

# CAL Ready to Certify

- Borrower Query
- Pending Certification Report
- MOVEit File





# Borrower Summary

## Applications

### Loan Applications on File

Application ID	Application Type	Requested Amount	Current Status	Status Date	CommonLine Unique ID
CL0003	COLLEGE ACCESS LOAN	\$6,500.00	<a href="#">Click Here for Status</a>	07/23/2020	<a href="#">Edit Certification Information</a>


## Loans

### Loans on File





























Loan ID	Loan Type	Status	Loan Period	Principal Balance	Interest Rate	CommonLine Unique ID
CL0001	COLLEGE ACCESS LOAN	IN SCHOOL	8/27/2018 - 5/7/2019	\$8,000.00	5.300%	<a href="#">Update Loan #CL0001</a>
CL0002	COLLEGE ACCESS LOAN	IN SCHOOL	8/26/2019 - 5/5/2020	\$6,500.00	5.200%	<a href="#">Update Loan #CL0002</a>

# Application Checklist

## Overview:

- ✓ Checklist is in process order
- ✓  Help bubble clarifies the task
- ✓ Responsibility clarifies who owns the task

Status: Incomplete

Task	Completion Date	Responsibility
 Borrower Application Completed 	6/23/2020	Borrower
Borrower has completed the online application.		
 Borrower Application Signed 	6/23/2020	Borrower
 Private Education Loan Applicant Self-Certification (BCF) Signed 	6/23/2020	Borrower
 Cosigner Application Completed 	6/24/2020	Cosigner
Cosigner has completed the Payment Guaranty and Promissory Note.		
 Cosigner Application Signed 	6/24/2020	Cosigner
 Lender Approval Completed 	6/24/2020	Lender
 School Certification Completed 		School
 Loan Guaranteed 		Lender
 Borrower Self Certification Sent 		Lender
 Private Education Loan Approval Disclosure (LAD) Sent 		Lender
 Private Education Loan Approval Disclosure (LAD) Accepted 		Borrower
 Private Education Loan Final Approval (LCD) form Sent 		Lender
 Required Right to Cancel Waiting Period 		Borrower
 Ready to Disburse 		Lender

# Certifying CAL

New School Certification Inquiry

Application Query

Borrower Query

Loan Query

Disbursal Query

Loan Reporting

Login Tips

ACH Enrollment Tips

Borrower Summary

\*\*\*\*-\*\*-\*\*\*\*

Reference Number:

Home Phone:

Cell Phone:

Work Phone:

Email:

Start A School Initiated Loan Application

New School Certification

Applications

Loan Applications on File

Application ID	Application Type	Requested Amount	Current Status	Status Date	CommonLine Unique ID
+ CL0001	COLLEGE ACCESS LOAN	\$16,242.00	Click Here for Status	06/24/2020	

# CAL Certification

## Loan Information

Application Type:

COLLEGE ACCESS LOAN

CommonLine Unique ID:

123456789123456789

Application ID:

CL0001

School Code:

123456

School Information:




THEB University

# Borrower Information

Borrower Information	
First Name	Elsa
Middle Initial	M
Last Name	Princess
Date of Birth	06/16/1989
SSN	***-**-1234
Street Address 1	123 Princess Lane
Street Address 2	
City	Disney City
State	Texas
ZIP	78777 -







# Enrollment Information

Enrollment Information	
School Name	<input type="text"/>
Grade Level	Sophomore
Enrollment Status	Full-Time
Academic loan period	08/24/2020  to 05/21/2021 
Anticipated Graduation Date	05/21/2021 

Financial Aid Information	
Cost of Attendance	20000
Estimated Financial Aid	6000
Certified Loan Amount	10000

# Disbursement Information

<b>Disbursal Information</b>	
<b>Number of Disbursals</b>	<input type="text" value="2"/>
<b>Disbursal 1 Date</b>	<input type="text" value="11/27/2020"/> 
<b>Disbursal 1 Amount</b>	<input type="text" value="5000"/>
<b>Disbursal 2 Date</b>	<input type="text" value="01/22/2021"/> 
<b>Disbursal 2 Amount</b>	<input type="text" value="5000"/>
<b>Disbursal 3 Date</b>	<input type="text"/> 
<b>Disbursal 3 Amount</b>	<input type="text"/>
<b>Disbursal 4 Date</b>	<input type="text"/> 
<b>Disbursal 4 Amount</b>	<input type="text"/>

# Certification

## Certification

I have applied or cause to have applied the rules of the College Access and the Hinson-Hazlewood College Student Loan Programs and certify the following, to the best of my knowledge:

1. The borrower named on this application is an eligible student in accordance with the rules of the College Access and the Hinson-Hazlewood College Student Loan Programs,
2. The borrower is not incarcerated,
3. The borrower is eligible for a loan in the amount certified,
4. The disbursement schedule complies with the requirements of the College Access and the Hinson-Hazlewood College Student Loan Programs,
5. Based on records available and inquiry made the borrower is not liable for an overpayment on any state or federal grant,
6. The information provided is true, complete, and accurate,
7. The borrower's request for the loan can be evidenced in our Financial Aid Office by the borrower's active OR passive confirmation of our offer of the proposed loan amount.

The amount of this loan may not exceed the difference between the cost of attendance and other forms of student assistance for which the student may be eligible. Other sources of student assistance include gifts, grants, scholarships, federal Perkins loans (to the extent that your institution has available Perkins funds), and Stafford loans (subsidized and unsubsidized), but not federal PLUS loans.

☒ Certify

Submit

# Change Transactions

# Change Transactions Instruction Guide

**60x30TX** Plan, Pay, & Complete College Institutional Resources & Programs Data & Reports Legislative & Media Resources About Us Search

Public Community, Technical, & State Colleges

Public Universities & Health-Related Institutions

Private Postsecondary Institutions

OERTX Repository

Institutional Grant Opportunities

Funding & Facilities

Governing Board Member Training

Student Financial Aid Programs

GEER State Grant and Emergency Educational Grant

Stay Connected

Program Resources

Exemptions and Waivers

Grant Programs

Loan Programs

IRS Certification Requirements

B-On-Time loan FAQ

Tuition Set-Asides

Work-Study & Scholarships

SFAP Frequently Asked Questions

Learning Resources

## Loan Programs

### COLLEGE ACCESS LOAN (CAL) PROGRAM

CAL program funds are available to eligible students attending public or private nonprofit institutions and entities, including Regional Education Services Centers located in Texas are eligible to participate in the CAL program. This program is authorized by [TEC, Chapter 52, Subchapter A](#). Rules establishing procedures to administer the subchapter can be found in [Title 19 of the TAC, Chapter 22, Subchapter C](#).

- [FY 2021 CAL Guidelines \[PDF\]](#)
- [FY 2020 CAL Guidelines \[PDF\]](#)

### B-ON-TIME (BOT) LOAN

The Texas B-On-Time loan program has been discontinued as of August 31, 2020 and no more funding can be issued. This program is authorized by [TEC, Chapter 56, Section 56.0092](#). Rules establishing procedures to administer the program can be found in [Title 19 of the TAC, Chapter 22, Subchapter Q](#).

- [FY 2021 BOT School Official Authorization Form \[PDF\]](#)
- [FY 2020 BOT Allocations \[PDF\]](#)
- [FY 2020 BOT Reallocation Request Form \[PDF\]](#)
- [FY 2020 BOT Guidelines \[PDF\]](#)

### Manage Loan Programs

- [Online Loans Return of Funds Forms](#)
- [HelmNet Online Reporting Instructions](#)
- [HelmNet Change Transactions Instruction Guide\\*\\*NEW\\*\\*](#)
- [B-On-Time loan FAQ](#)
- [IRS Certification Requirements](#)
- [Electronic Funds Transfer Instructions](#)

### Web Portals

To add, update or remove a user's access, submit a [User Access Form \[PDF\]](#).

### MOVEit DMZ

- [MOVEit DMZ Login](#)
- [MOVEit DMZ User Guide \[PDF\]](#)

### HelmNet (HHLOANS)

- [HelmNet \(HHLOANS\) Login](#)
- [HelmNet Online Reporting Manual \[PDF\]](#)

**CUSTOMER SATISFACTION SURVEY:** Take a moment to provide feedback.



# Change Transactions Instruction Guide

## HelmNet Change Transactions Instruction Guide

**Purpose**  
The purpose of this guide is to provide instructions on how to process change transactions during the current program year after completing certification for the College Access Loan (CAL) and Texas Armed Services Scholarship Program (TASSP) through the HelmNet online portal.

**Accessing Update Options**  
Institutions can use the Update Loan feature within the HelmNet portal to make certain updates to a using two different options.

**Option 1: Pull up the student record in HelmNet by using the Borrower Query.**  
Click on the Update Loan option on the Borrower Summary screen.

**Option 2: Institution can use the online Loan Reporting feature in HelmNet to access a listing of scholarship or loan recipients. Available reports include:**

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

**Note:** Refer to the [HelmNet Online Reporting Instructions](#) for more information regarding this tool.

**Transaction Options**  
The following three transaction options are currently available:

- Update Loan Period
- Cancel Loan
- Pre-Disbursement Changes

**The following are unavailable:**

- Post-Disbursement Changes
- School Refund
- School Refund Correction

**Update Loan Period**  
By selecting the Update Loan Period option, institutions can make the following changes during the program year:

- Change Loan Period
- Change Grade Level
- Change Anticipated Graduation Date

**Cancel Loan**  
By selecting the Cancel Loan option, institutions can enter a date of cancellation prior to disbursement.

- Once canceled, the Reinstatement Loan option appears but reinstatement requests must be sent through [CONTACT US](#) to be processed by the THECB.

**Pre-Disbursement Changes**  
By selecting the Pre-Disbursement Changes option, institutions can make the following changes on pending disbursements:

- Cancel Disbursement
  - Enter \$0.00 in Gross Amount and enter a Cancel Date
- Change Disbursement Date
- Change Disbursement Amounts
  - Increase/Decrease pending disbursements
- Change Disbursement Status
  - Hold or Release

**System Tip**  
Using the Hold feature will prevent funds from disbursing to the institution. Institutions will need to manually Release the disbursements on Hold.

**Note:** To increase an amount, the total of all disbursements cannot exceed the Guarantee Amount.

### HelmNet Loans and Scholarships Updates Chart

Changes can be made at various stages of the loan or scholarship life-cycle. The chart below identifies the appropriate action based on the stage.

Program	HelmNet Change Transactions	LIFE CYCLE					Additional Information
		Application	School Certification Complete LAD Issued	LAD Accepted Loan Pending Future Disbursement	Partial Disbursement	Full Disbursement	
CAL TASSP	Cancel a loan		✓	✓			A loan or scholarship can be fully canceled up until the first payment is <b>Ready to be Disbursed</b> (3 business days before the disbursement date).
CAL TASSP	Cancel a disbursement		✓	✓	✓		Pending disbursements can be changed up until they are <b>Ready to be Disbursed</b> (3 business days before the disbursement date).
CAL TASSP	Change disbursement date		✓	✓	✓		
CAL TASSP	Change disbursement amount (increase/decrease)		✓	✓	✓		
CAL TASSP	Change disbursement status to Hold or Release		✓	✓	✓		
CAL TASSP	Change loan period date		✓	✓	✓	✓	Changes to the Loan Period Dates, Graduation Date and Grade level can be made during the current program year after an institution certifies an application.
CAL TASSP	Change student's Anticipated Graduation Date		✓	✓	✓	✓	
CAL TASSP	Change student's grade level		✓	✓	✓	✓	

\*LAD = Private Education Loan Approval Disclosure

# HelmNet Post-Certification Changes

The following three transaction options are currently available:

- Update Loan Period
- Cancel Loan
- Pre-Disbursement Changes

The following are unavailable:

- Post-Disbursement Changes
- School Refund
- School Refund Correction

## CL Change Transactions for Loan #00000#

Update Loan Period  
Cancel Loan  
Pre-Disbursement Changes  
Post-Disbursement Changes  
School Refund  
School Refund Correction

**Borrower SSN:** XXXXXXXX  
**Loan Type:** CAL / TASSP  
**Guarantee Date:** ## / ## / ####  
**CommonLine ID:** XXXXXXXXXXXXXXXX

Return To Borrower Summary ( XXXXXXXX )

# Update Loan or Scholarship

Loans

Loans on File

Loan ID	Loan Type	Status	Loan Period	Principal Balance	Interest Rate	CommonLine Unique ID
CL0001	COLLEGE ACCESS LOAN	IN SCHOOL	8/27/2018 - 5/7/2019	\$8,000.00	5.300%	<div>Update Loan #CL0001</div>
CL0002	COLLEGE ACCESS LOAN	IN SCHOOL	8/26/2019 - 5/5/2020	\$6,500.00	5.200%	<div>Update Loan #CL0002</div>

# Cancel Loan or Scholarship

@1-08 - Cancel Loan for Loan #CL0003

- Update Loan Period
- Cancel Loan
- Pre-Disbursement Changes
- Post-Disbursement Changes
- School Refund
- School Refund Correction

**Borrower SSN:** \*\*\*-\*\*-\*\*\*\*  
**Loan Type:** COLLEGE ACCESS LOAN  
**Guarantee Date:** 8/10/2020  
**CommonLine ID:** -----

**Guarantee Amount:** \$10,000.00  
**Loan Balance:** \$0.00  
**Academic End Date:** 12/31/2020

**Loan Cancellation Date:** 11/16/2020

Your transaction has been submitted for processing. Please check your status at a later time.

Reset

Save



# Cancel Loan or Scholarship

Update Loan Period

Reinstate Loan

Pre-Disbursement Changes

Post-Disbursement Changes

School Refund

School Refund Correction

Once canceled, the Reinstate Loan option appears but reinstatement requests must be sent through CONTACT US to be processed by the THECB.



# Pre-Disbursement Changes

@1-09 - Pre-Disbursement Changes for Loan #CL0002

Update Loan Period  
~~Cancel Loan~~  
**Pre-Disbursement Changes**  
Post-Disbursement Changes  
School Refund  
School Refund Correction

**Borrower SSN:** \*\*\*-\*\*-\*\*\*\*  
**Loan Type:** COLLEGE ACCESS LOAN  
**Guarantee Date:** 7/21/2020  
**CommonLine ID:**

**Guarantee Amount:** \$20,000.00  
**Loan Balance:** \$10,000.00  
**Academic End Date:** 5/11/2021  
**Cancel Amount:** \$1,000.00

Disb Number:	1	2	3	4
Status:	DISBURSED	PENDING/RELEASED		
Gross Amount:	10000.00	9000.00		
Date:	08/10/2020	01/09/2021		
Hold/Release:	Release	Release		
Cancel Date:				

Reset

Calculate

Save

# Update Loan Period

@1-07 - Update Loan Period for Loan #CL0001

Update Loan Period

Cancel Loan

Pre-Disbursement Changes

Post-Disbursement Changes

School Refund

School Refund Correction

**Borrower SSN:** \*\*\*-\*\*-\*\*\*\*

**Loan Type:** COLLEGE ACCESS LOAN

**Guarantee Date:** 7/21/2020

**CommonLine ID:** C

**Last Disbursal Date:** 1/9/2021


**Guarantee Amount:** \$21,174.00


**Loan Balance:** \$10,587.00


**Academic End Date:** 5/29/2021

**First Disbursal Date:** 8/10/2020

Loan Period Start Date: 08/19/2020 

Loan Period End Date: 05/29/2021 

Grade Level: Freshman 

Anticipated Graduation Date: 05/20/2023 

Reset

Save

# Contact Us

# Contacting Student Financial Aid Programs

FAS institutional phone line:

**CALL: (844) 792-2640**

Student Borrower phone line is  
**coming soon:**

**CALL: (800) 242-3062**



# 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**” as the Contact Reason
- Provide the best **direct phone number**

**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](#)



# Contact Information and Feedback

**Email:** [leah.smalley@highered.texas.gov](mailto:leah.smalley@highered.texas.gov)

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

**Contact Us:** <https://www1.highered.texas.gov/Apps/CRAFT/Home/Create>  
(Select “Financial Aid Question” as the Contact Reason.)

# Questions?