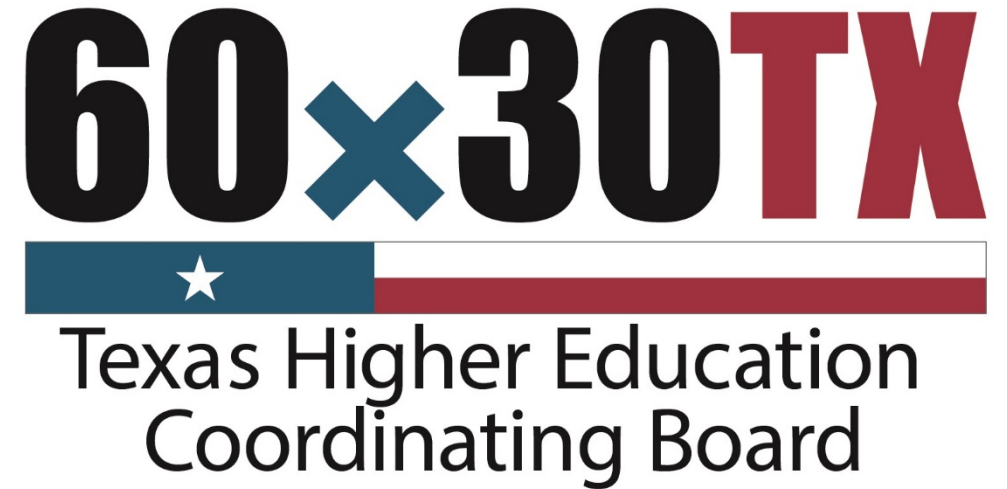


User Access Annual Review

Leah Smalley
Student Financial Aid Programs
October 20, 2020



User-Access



User Access Information

Process Overview

Live Demonstration

Questions?

User Access Information

- Memo sent **Oct. 15, 2020.**
- Located on the SFAP webpage → Stay Connected.
- Financial Aid Directors must complete:
 - **Step 1:** Review list
 - **Step 2:** Send changes
 - **Step 3:** Complete survey
- Deadline to submit survey and form (if applicable) is **Nov. 13, 2020.**



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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).

Process Overview

Step 1: Review User Accounts



2020 User Access Verification

To comply with the Texas Higher Education Coordinating Board (THECB) privacy and security policy, the Director of Financial Aid must complete these steps:

1. Filter and review your institution's user accounts for the CBPass, MOVEit, and HelmNet web portals listed below. Determine whether updates are needed.
2. If updates are necessary, complete and submit a [User Access Form](#).
3. All institutions must complete the required [User Access Review and Verification Survey](#).

THE DEADLINE TO COMPLETE THE SURVEY AND SUBMIT UPDATED USER INFORMATION IS NOVEMBER 13, 2020.

Web Portal	Institution	First Name	Last Name	Email Address
MOVEit	ABC University	Daisy	Duck	daisyduck@abc.edu
MOVEit	ABC University	Minnie	Mouse	minniemouse@abc.edu
CBpass_GNSP	ABC University	Daffy	Duck	daffyduck@abc.edu
HelmNet	ABC University	Pluto	Dog	plutodog@abc.edu
HelmNet	ABC University	Mickey	Mouse	mickeymouse@abc.edu
CBpass_FAD	ABC University	Daisy	Duck	daisyduck@abc.edu
CBpass_Grant_Payment	ABC University	Mickey	Mouse	mickeymouse@abc.edu

Step 2: Complete User Access Form

If accounts need to be added or removed, complete a form.

Form reminders:

- HelmNet - Request, remove, and update credentials.
- CBPass - Remove application access to the Grant Payment Program (GPP), Financial Aid Database (FAD), and the Good Neighbor Program (GNP).
- MOVEit - Update authorized designees.

60x30TX
Texas Higher Education Coordinating Board

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:	Phone:
Title:		Email:

☐ 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: _____

As of 08/21/2020 1 | Page

Step 3: Complete the Survey

- All institutions must fill out and submit a survey.
- Two options:
 - All accounts are correct.
 - Updates were needed. (User Access Form was submitted.)



2020 User Access Review and Verification Survey
Student Financial Aid Programs

Exit

Financial Aid Directors should follow these steps to complete the annual User Access Review process by **Nov. 13, 2020**:

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 you have completed the review and submitted your User Access Form (if necessary), answer the verification statement below. Then select the "Done" button to submit this required survey.

2020 User Access Review and Verification Survey - Deadline to submit is **Nov. 13, 2020**.
**Questions marked with an asterisk must be completed.*

*** 1. Verification Statement**

☐ I have reviewed the list of users for HelmiNet, CBPass, and MOVEit, and I **confirm** that the information listed in the User Access Spreadsheet is **CORRECT** and does **NOT** require any updates or changes.

☐ I have reviewed the list of users for HelmiNet, CBPass, and MOVEit, and I **confirm** that the information listed in the User Access Spreadsheet is **INCORRECT** and **REQUIRED** updates/changes. I have completed and submitted the updated [User Access Form](#).

*** 2. Enter your contact information here:**

Institution Name

FICE Code

Name of Director of Financial Aid

Phone Number of Director of Financial Aid

Email Address of Director of Financial Aid

If you have questions, email Financial Aid Services through [CONTACT US](#) (select "Financial Aid Question" as the Contact Reason).

Done

Live Demonstration

Contact Us

Contacting Financial Aid Services

The FAS institutional phone line is **now available!**

CALL: (844) 792-2640

Submit inquiries 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**” 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

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?