User Access Annual Review

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Student Financial Aid Programs
October 20, 2020

60×30TX
Texas Higher Education
Coordinating Board
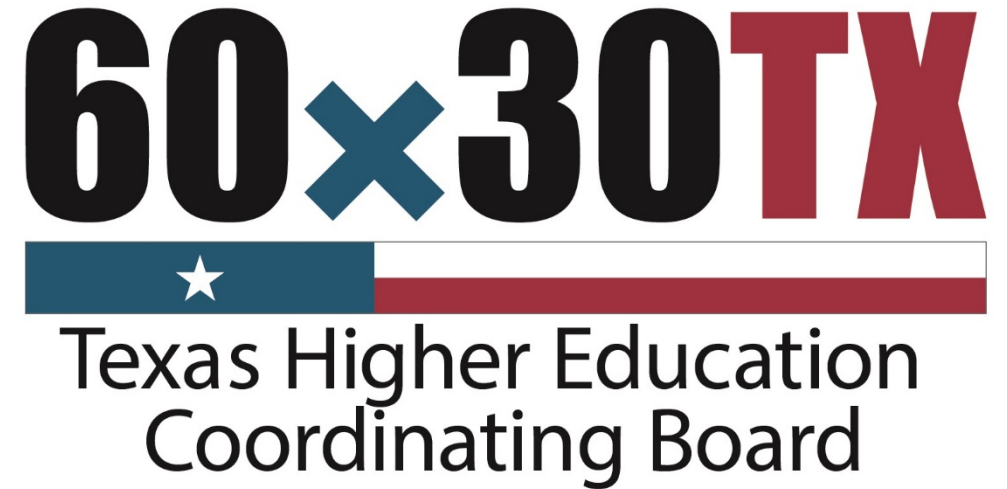
User Access Information

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**.

Process Overview

Step 1: Review User Accounts

60×30TX
Texas Higher Education Coordinating Board

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.

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.)

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

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
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)	

Submit | 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?