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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: November 8, 2018

RE: User Access Portal Review 2018

Financial Aid Services (FAS) requires an annual User Access Review for the secure web portals used to transmit information between institutions and the Texas Higher Education Coordinating Board (THECB). The three main financial aid portals include: Higher Education Loan Management System (HelmNet), Coordinating Board Pass (CBPASS) and MOVEit DMZ. These web portals allow staff at the institution to access FERPA regulated information. For compliance and security purposes, institutions are required to ensure that designated portal users are accurate and up-to-date.

To complete the User Access Review process, Financial Aid Directors are required to review the list of approved HelmNet, CBPASS and MOVEit users for their institution to determine if updates are needed. Please follow the steps below to ensure the accuracy of this review:

- Step 1.** Review the user accounts listed on the [User Access Review spreadsheet](#) for the three web-portals.
- Step 2.** Complete the required [User Access Verification Survey Form](#) to confirm that all users were reviewed.
- Step 3.** Submit a [System Authorization Form](#) for any updates needed for your institution's users' accounts.

The deadline to review the User Access spreadsheet, Verification Survey Form, and to submit updates is **December 21, 2018**.

For questions about the User Access Review process, please contact FAS at 1-844-792-2640 or email UserAccess@theccb.state.tx.us.