

Grant and Aid Processing Platform (GAPP) Training - Setting Up User Profiles

August 31, 2023

Topics of Discussion



**Overview of
GAPP**

User Roles

**Account
Creation**

**Approving &
Assigning
Roles**

**Account
Maintenance**

**Deadlines
&
Reminders**

Overview of GAPP

The New Grant and Aid Processing Platform:

- Will integrate most of our financial aid programs into ONE CENTRAL location
- Allows schools to:
 - Approve User Access Requests
 - Upload Documents
 - Request Payments
 - Monitor Program Spending
 - Submit Authority to Transfer Requests
 - Send inquiries directly to THECB



GAPP will go live with the following programs:

- TEXAS Grant
- TEOG
- TEG
- Educational Aid Exemption
- Bilingual Education
- State Work Study Programs



User Roles

User Roles



Primary Point of Contact (PPC)

Secondary Point of Contact (SPC)

Reporting Official (RO)

Business Office Contact (BOC)

Institutional Aid Administrator (IAA)

- ✓ Is granted access by THECB
- ✓ Grant/Remove access to users
- ✓ Can submit the yearly intent to participate
- ✓ Can submit and approve the following:
 - Transfer Requests
 - Return of Funds
 - Update Student Count
- ✓ Submit/Review help desk tickets

User Roles

Primary Point of Contact (PPC)



Secondary Point of Contact (SPC)

Reporting Official (RO)

Business Office Contact (BOC)

Institutional Aid Administrator (IAA)

- ✓ Can only be granted access by PPC
- ✓ Grant/Remove access to users
- ✓ Can submit the yearly intent to participate
- ✓ Can submit and approve the following:
 - Transfer Requests
 - Return of Funds
 - Update Student Count
- ✓ Submit/Review help desk tickets

User Roles

Primary Point of Contact (PPC)

Secondary Point of Contact (SPC)



Reporting Official (RO)

Business Office Contact (BOC)

Institutional Aid Administrator (IAA)

✓ Access is granted by PPC/SPC

✓ Can submit the following:

- Transfer Requests
- Return of Funds
- Update Student Count

✓ Submit/Review help desk tickets

User Roles

Primary Point of Contact (PPC)

Secondary Point of Contact (SPC)



Reporting Official (RO)

Business Office Contact (BOC)

Institutional Aid Administrator (IAA)

Details Staff List **Financial Aid Program** Intent to Participate Requests

Showing 4 of 4 Items

Program	Reporting Official
TEXAS Grant	Mary Luc
Bilingual Education	Mister Barry
Educational Aide Exemption	Isley
State Work Study Program	Luther

Note: Multiple RO's can be granted access, but only one per program.

User Roles

Primary Point of Contact (PPC)

Secondary Point of Contact (SPC)

Reporting Official (RO)



Business Office Contact (BOC)

Institutional Aid Administrator (IAA)

- ✓ Access is granted by PPC/SPC
- ✓ Can view the Institutional Profile and Allocations tiles in the portal
- ✓ Submit/Review help desk tickets

User Roles

Primary Point of Contact (PPC)

Secondary Point of Contact (SPC)

Reporting Official (RO)

Business Office Contact (BOC)



Institutional Aid Administrator (IAA)

- ✓ Access is granted by PPC/SPC
- ✓ Can view the Institutional Profile and Allocations tiles in portal
- ✓ Submit/Review help desk tickets

Primary Point of Contact (PPC) Account Creation

Account Creation Process for PPC

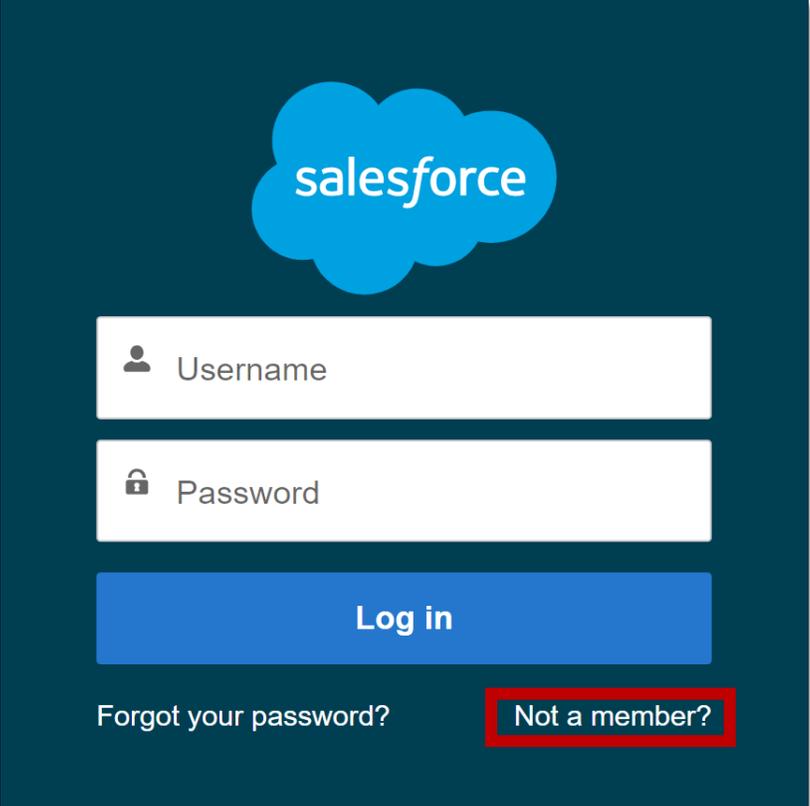
**Set up
account in
GAPP**

**Approve User
Role Access**

**Assign
Institutional Staff a
Role**

Account Creation Process for PPC

- An announcement with a link will be sent to the Financial Aid Directors to create a GAPP account.
- Financial Aid Directors will need to create an account by clicking on the “Not a member?” link.



salesforce

Username

Password

Log in

Forgot your password? [Not a member?](#)

Account Creation Process for PPC

* First Name

* Last Name

* Email

* Phone

* FICE Code

* Title

* Address Line 1

Address Line 2

* City

* State

* Zip Code

I am Primary Point of Contact for my Institution

[Sign Up](#)

- The Director will be prompted to fill out an account creation form.
- To be affiliated with the correct institution, select the FICE Code from the dropdown menu.
- To be granted access as the PPC, the “I am the Primary Point of Contact for my institution” checkbox must be checked.

Account Creation Process for PPC

* First Name

* Last Name

* Email

* Phone

* FICE Code

* Title

* Address Line 1

Address Line 2

* City

* State

* Zip Code

I am Primary Point of Contact for my Institution

- The Director will be prompted to fill out an account creation form.
- To be affiliated with the correct institution, the corresponding FICE must be selected.
- To be granted access as the PPC, the “I am the Primary Point of Contact for my institution” checkbox must be checked.

I am Primary Point of Contact for my Institution

Account Creation Process for PPC

Once the account creation form is submitted, THECB will review and process the request.

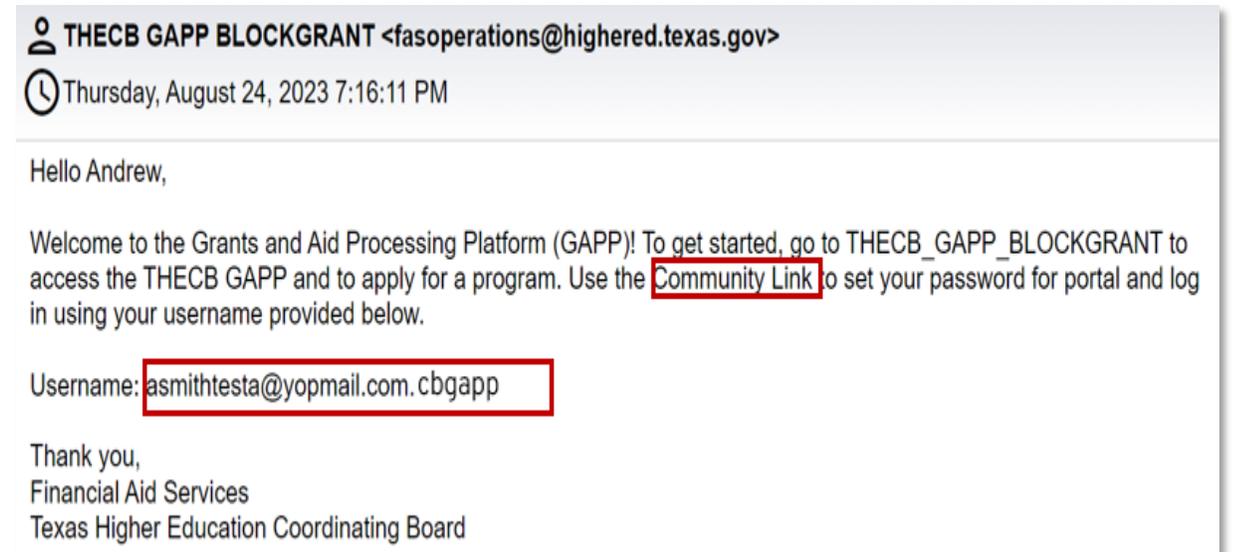
Success!

Your details have been submitted to THECB for approval.
You will receive a notification once the approval process is completed.

[Return To Login](#)

Account Creation Process for PPC

Once THECB approves the request, the PPC will receive an email with their account username and a password creation link.



Note: Username will be your email address with .cbgapp

Account Creation Process for PPC

Change Your Password

Enter a new password for **jgom2023test@yopmail.com.blockgrants**. Make sure to include at least:

- 14 characters
- 1 uppercase letter
- 1 lowercase letter
- 1 number
- 1 special character ⓘ

* New Password

* Confirm New Password

Change Password

Password was last changed on 8/26/2023, 12:47 AM.

The PPC will be prompted to create a password after clicking on the community link.

Account Creation Process for PPC

The screenshot shows the homepage of the Texas Higher Education Coordinating Board (THECB). The header includes the THECB logo and navigation links for Home, About, Edit Profile, Help Desk, and Pending User Approvals. A dark blue banner features the text "Resource. Partner. Advocate." and a paragraph describing the Office of Student Financial Aid Programs (SFAP). Below the banner are three white buttons with dark blue THECB logos and labels: "Institutional Profile", "Allocations", and "Requests". A footer link for "Privacy & Security" is visible at the bottom.

- The PPC will be directed to the GAPP landing page after creating a secure password.
- For a walkthrough of the GAPP portal, refer to [the SFAP webcast held on August 24, 2023.](#)

Institutional Aid Administrator (IAA) Account Creation

Account Creation Process for IAA

Institutional staff will need to access the GAPP link to create an account by clicking on “**Not a member?**”

salesforce

Username

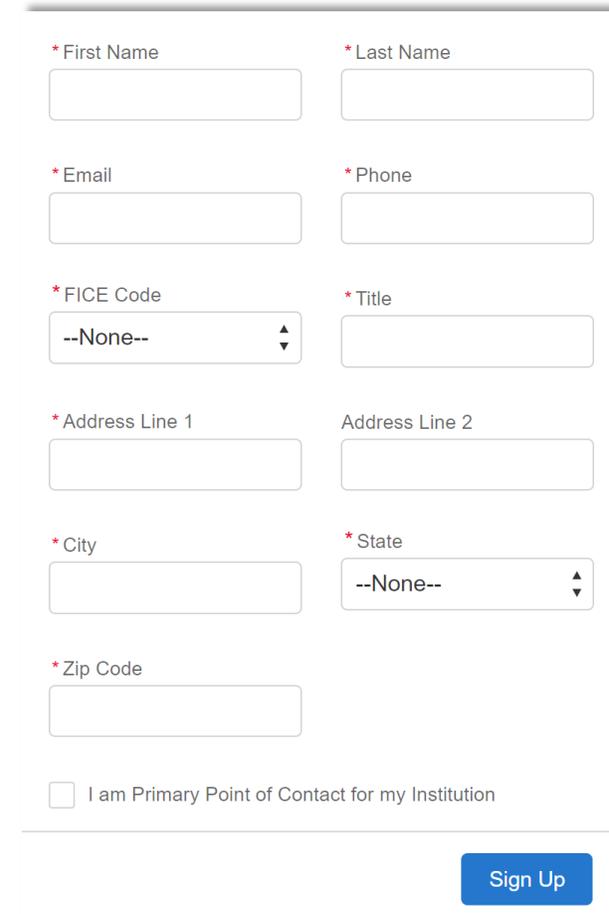
Password

Log in

Forgot your password? **Not a member?**

Account Creation Process for IAA

- Staff will need to create an account by filling out a short registration form.
- To be affiliated with the correct institution, select the FICE Code from the dropdown menu.
- To ensure access requests are routed to the PPC for approval, staff should **NOT** select the box indicating that they are the Primary Point of Contact.



The registration form is a white rectangular box with a thin grey border. It contains several input fields and a checkbox, arranged in two columns. The fields are: * First Name (text input), * Last Name (text input), * Email (text input), * Phone (text input), * FICE Code (dropdown menu with "--None--" selected), * Title (text input), * Address Line 1 (text input), Address Line 2 (text input), * City (text input), * State (dropdown menu with "--None--" selected), and * Zip Code (text input). At the bottom left is a checkbox labeled "I am Primary Point of Contact for my Institution". At the bottom right is a blue button with white text that says "Sign Up".

Account Creation Process for IAA

Success!

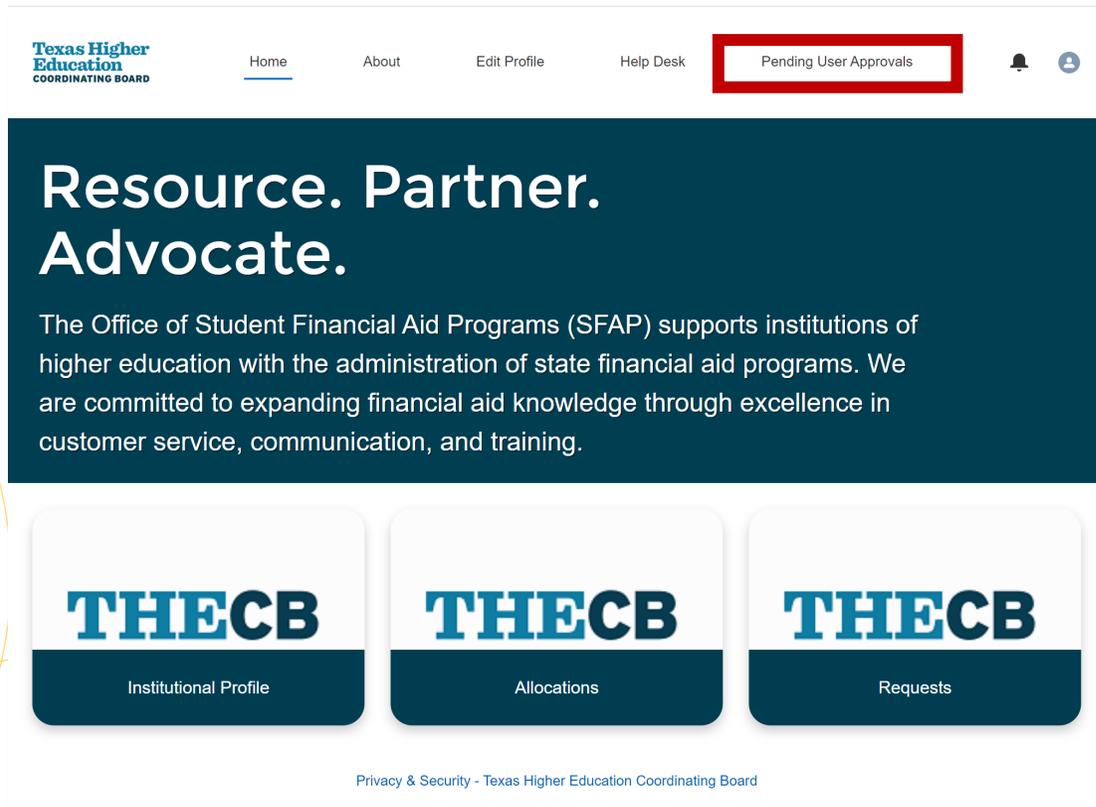
Your details have been submitted.

You will receive a notification once the approval process is completed.

[Return To Login](#)

Approving IAA Requests

Approval Process for IAA



The screenshot shows the Texas Higher Education Coordinating Board website. The navigation menu includes Home, About, Edit Profile, Help Desk, and Pending User Approvals (highlighted with a red box). The main content area features a dark blue banner with the text 'Resource. Partner. Advocate.' and a description of the Office of Student Financial Aid Programs (SFAP). Below the banner are three white cards with blue accents, each containing the THECB logo and a link: 'Institutional Profile', 'Allocations', and 'Requests'. The footer contains the text 'Privacy & Security - Texas Higher Education Coordinating Board'.

- After the staff member submits a request for access, their request will automatically route to the PPC.
- Access should only be granted to staff who will be involved in the administration of the financial aid programs in GAPP.
- To view requests the PPC will need to log into GAPP and click on the “**Pending User Approvals**” section.

Approval Process for IAA

If approved, the staff member will be sent an automated email with their username and a community link that will prompt them to create a secure password.

 THECB GAPP BLOCKGRANT <fasoperations@highered.texas.gov>

 Friday, August 25, 2023 4:14:10 PM

Hello Scott,

Welcome to the Grants and Aid Processing Platform (GAPP)! To get started, go to THECB_GAPP_BLOCKGRANT to access the THECB GAPP and to apply for a program. Use the [Community Link](#) to set your password for portal and log in using your username provided below.

Username: smar2023test@yopmail.com .cbgapp

Thank you,
Financial Aid Services
Texas Higher Education Coordinating Board

Assigning Institutional Roles

Assigning Roles

To assign the role of a Secondary Point of Contact (SPC) or Business Office Contact (BOC), the PPC will need to click on the respective buttons under the contact's profile.

The screenshot displays the user management interface for the Texas Higher Education Coordinating Board. At the top, the logo and navigation links (Home, About, Edit Profile, Help Desk, Pending User Approvals) are visible. The user profile for Scott Martin is shown, including contact information and a 'Roles' section. Three buttons are highlighted with a red box: 'Assign/Remove RO', 'Assign/Remove SPC', and 'Assign/Remove BOC'. The 'Roles' section contains checkboxes for 'Primary Point Of Contact', 'Secondary Point Of Contact', 'Business Office Contact', and 'Reporting Official', all of which are currently unchecked.

Field	Value
Account Name	UNIVERSITY OF TEXAS SOUTHWESTERN MEDICAL CENTER AT
Email	smar2023test@yopmail.com
Name	Scott Martin
Phone	(000) 000-0000
FICE Code	010019
Account Name	UNIVERSITY OF TEXAS SOUTHWESTERN MEDICAL CENTER AT
Active	<input checked="" type="checkbox"/>
Primary Point Of Contact	<input type="checkbox"/>
Secondary Point Of Contact	<input type="checkbox"/>
Business Office Contact	<input type="checkbox"/>
Reporting Official	<input type="checkbox"/>
Email	smar2023test@yopmail.com
Title	teSTING LN
Address Line 1	Test
Address Line 2	

Assigning Roles

After clicking on either the **Assign/Remove SPC** or **Assign/Remove BOC** buttons, the following window will appear. The PPC will need to select the box with the corresponding role and click on submit.

The screenshot displays the THECB user interface. At the top, the navigation menu includes 'Home', 'About', 'Edit Profile', 'Help Desk', and 'Pending User Approvals'. A dropdown menu is open, showing 'Assign/Remove SPC' and 'Assign/Remove BOC' options. A modal window titled 'Assign/Remove SPC' is centered on the screen. The modal contains the following text: 'Check the box below and click Submit to add the role to the user. Leave it unchecked to remove the role.' Below this text is a checkbox labeled 'Secondary Point of Contact'. At the bottom right of the modal is a blue 'Submit' button. The background shows a list of users with checkboxes for assigning roles.

Assigning Roles

After the PPC assigns a role, the IAA will be granted the permissions for the corresponding role.

Contact
Scott Martin

Account Name: UNIVERSITY OF TEXAS SOUTHWESTERN MEDICAL CENTER AT
Email: smar2023test@yopmail.com

Name: Scott Martin
Phone: (000) 000-0000

Email: smar2023test@yopmail.com
Title: teSTING LN

▼ Roles

Primary Point Of Contact

Secondary Point Of Contact

Business Office Contact

Reporting Official

Assigning Roles

The Reporting Official (RO) Contact role process is slightly different; a program can only have one RO assigned to it.

The screenshot shows a user profile for Scott Martin. At the top right, there are three buttons: "Assign/Remove RO", "Assign/Remove SPC", and "Assign/Remove BOC". The profile details include:

- Account Name: Scott Martin
- Email: smar2023test@yopmail.com
- Name: Scott Martin
- Phone: (000) 000-0000
- FICE Code: 010019
- Account Name: (empty)
- Active:
- Roles:
 - Primary Point Of Contact:
 - Secondary Point Of Contact:
 - Business Office Contact:
 - Reporting Official:
- Email: smar2023test@yopmail.com
- Title: teSTING LN
- Address Line 1: Test
- Address Line 2: (empty)

Assigning Roles

After clicking on the **Assign/Remove RO** button, the PPC will then be prompted to select which program(s) the IAA will be assigned as Reporting Official.

Contact
Scott Martin

Assign/Remove RO Assign/Remove SPC Assign/Remove BOC

Assign/Remove RO

Check the box below and click Submit to add the role to the user. Leave it unchecked to remove the role.

Select Programs

- Toward Excellence, Access, and Success Grant (TEXAS Grant)
- Educational Aide Exemption

Submit

Business Office Contact

Reporting Official

@yopmail.com

Assigning Roles

The IAA, PPC, and SPC will receive a confirmation email after a role has been assigned or removed.

fasoperations@highered.texas.gov <fasoperations@highered.texas.gov>
Monday, August 28, 2023 9:08:33 AM
Show pictures

Hello Scott Martin,

Thank you for requesting access to the Texas Higher Education Coordinating Board's Grants and Aid Processing Platform (GAPP) web portal. Per your request, Reporting Official access has been granted to the following:

smar2023test@yopmail.com

1. Toward Excellence, Access, and Success Grant (TEXAS Grant)

Please log into system to view access.

Should you have any additional questions, please contact Financial Aid Services at (844) 792-2640 or through the GAPP Help Desk.

Thank you,
Financial Aid Services
Texas Higher Education Coordinating Board

fasoperations@highered.texas.gov <fasoperations@highered.texas.gov>
Monday, August 28, 2023 9:08:32 AM
Show pictures

Hello Jessica Gomez,

Thank you for requesting access to the Texas Higher Education Coordinating Board's Grants and Aid Processing Platform (GAPP) web portal. Per your request, Reporting Official access has been granted to the following:

smar2023test@yopmail.com

1. Toward Excellence, Access, and Success Grant (TEXAS Grant)

Please log into system to view access.

Should you have any additional questions, please contact Financial Aid Services at (844) 792-2640 or through the GAPP Help Desk.

Thank you,
Financial Aid Services
Texas Higher Education Coordinating Board

Account Maintenance

Verifying Roles

The PPC/SPC can verify a user's access in the **Roles** section of the staff profile and make updates.

The screenshot displays the staff profile for Scott Martin. The page includes a navigation bar with links for Home, About, Edit Profile, Help Desk, and Pending User Approvals. The profile details on the left include the account name, name (Scott Martin), phone number, FICE code, and an active status. The main content area features a 'Roles' section with four checkboxes: Primary Point Of Contact, Secondary Point Of Contact, Business Office Contact, and Reporting Official. A red box highlights the 'Roles' section in the left sidebar, and another red box highlights the 'Reporting Official' checkbox in the main content area.

Deactivating Institutional Users

To deactivate a user, click on the menu expansion button on the right of the Contact profile and click on **Deactivate User**.

The screenshot shows a user profile for Scott Martin. At the top right, there is a menu with options: 'Assign/Remove RO', 'Assign/Remove SPC', 'Assign/Remove BOC', and 'Deactivate User'. The 'Deactivate User' option is highlighted with a red box. Below the profile information, a modal window titled 'Deactivation confirmation' is open. It contains a warning icon and the text 'Are you sure you want to deactivate the user?'. At the bottom of the modal, there are two buttons: 'No' and 'Yes'. The 'Yes' button is highlighted with a red box. Below the modal, there are checkboxes for 'Business Office Contact' (unchecked) and 'Reporting Official' (checked).

Deactivating User Accounts

Once a user has been deactivated, the Active field under the Contact Profile should be unchecked.

Contact
Scott Martin

Assign/Remove RO Assign/Remove SPC Assign/Remove BOC

Deactivate User

Account Name UNIVERSITY OF TEXAS SOUTHWESTERN MEDICAL CENTER AT Email smar2023test@yopmail.com

Name Scott Martin

Phone (000) 000-0000

FICE Code 010019

Account Name UNIVERSITY OF TEXAS

Active **Active**

Roles

Primary Point Of Contact

Secondary Point Of Contact

Business Office Contact

Reporting Official

Email smar2023test@yopmail.com

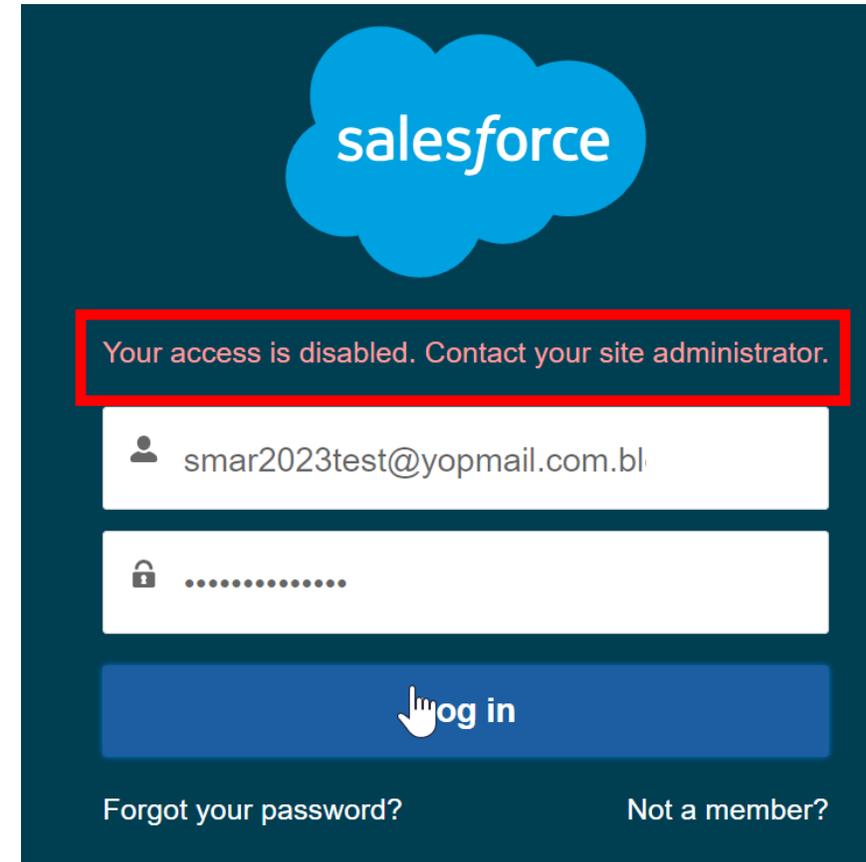
Title teSTING LN

Address Line 1 Test

Address Line 2

Deactivating User Accounts

Once deactivated, the user will not be able to log into GAPP.



Deactivating PPC Accounts

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 05/12/2022 1 | Page

The User Access form must be completed to remove a current Director before THECB can add a new PPC.

Deadlines and Reminders

Deadlines and Reminders

Deadlines

August 31, 2023

- Deadline to log in to your HelmNet Account before deactivation
- Deadline to expend or return 2022-23 (FY23) TCWS funds

Reminders

- Comptroller Closure: August 31 through September 1, 2023
- Agency Closure: September 4, 2023
- Financial Aid Database FY23- Cycle Three
First day to submit file: September 20, 2023

Recent Notifications

- [College Access Loan \(CAL\) Interest Rate Change Memo - dated 08/24/23](#)
- [Future Occupations & Reskilling Workforce Advancement to Reach Demand \(FORWARD\) Loan Interest Rate Change Memo - dated 08/24/23](#)
- Fall 2023 Institutional Calendar - released 08/21/23

Contact Student Financial Aid Programs

FAS Contact Information for Institutions:

- FAS Institutional Phone Line
 - Institutions Only: (844) 792-2640

FAS Contact Information for the General Public:

- Texas Financial Aid Information Center Phone Line
 - General Public: (888) 311-8881

All can submit inquiries online through the [CONTACT US](#) web form.



**Phone Line
Hours of Operation:**
Mon-Fri
8 a.m. to 5 p.m.
(Closed daily
from 12 to 1 p.m.)

Submit 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.
- Describe your inquiry in 4000 characters or less.

Provide the best **direct phone number** to reach you.

Texas Higher Education Coordinating Board

Contact Us

*An asterisk * by the field indicates a required field!*

Received From*

Institution

Contact Reason*

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*

First Name*

Last Name*

E-mail*

Phone (10-digit) **Phone Ext**

Mail Address

Mail Address2

Mail Address3

City

State **Zip Code (5-digit)**

| [Help](#)



**Texas Higher
Education
COORDINATING BOARD**

Thank You!