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Board of Regents

University System of Ohio

STATE GRANTS AND SCHOLARSHIPS (SGS) GUIDANCE MEMO

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RELEVANT STATUTE:	NOT APPLICABLE

The Higher Education Information (HEI) System is the primary tool used by financial aid personnel to view queries and reports, request payments and issue refunds for State Grants and Scholarships (SGS) programs on behalf of their students. Until now, there has been a specific HEI Administrative Assistant assigned to facilitate the issuance of HEI accounts and assist with access problems and questions.

The responsibility to administer accounts for financial aid personnel now resides within SGS. The two people who can aid in matters regarding access for the financial aid community are myself, cfoust@regents.state.oh.us, 614.752.9475, & Barb Thoma, bthoma@regents.state.oh.us, 614.752.9535.

All institutions/campuses are assigned one Financial Aid Contact or Financial Aid Liaison whose major responsibilities are requesting the addition of new users, requesting the deletion of users no longer needing access and assigning areas of access and specific submission file permission to all authorized users. These responsibilities can be carried out directly through the Liaisons Only section of the HEI site under 'Administer HEI Web Accounts'. If an institution/campus needs to update its Financial Aid Contact/Liaison, a letter requesting such needs to be initiated by the campus President or Director.

Once a Financial Aid Contact/Liaison submits a request to add a new user, the new user must complete a User Authorization Form and fax it to the Ohio Board of Regents. There has been some confusion in this transition of responsibility as to the point person and fax number to use when sending this document. Along with this guidance memo is an updated User Authorization Form for financial aid personnel including the SGS fax number, 614.752.5903. Until the HEI site can be updated with this form, please keep this available for all new financial aid users who are added from this point forward.

As part of this transition of responsibility, and in the spirit of maintaining the integrity and security of access to the HEI system, we are asking all Financial Aid Contacts/Liaisons to visit the Liaisons Only section of the HEI site, [https://qry.regents.state.oh.us/cgi/HEInet.cgi?\\$sp_html_hei_login](https://qry.regents.state.oh.us/cgi/HEInet.cgi?$sp_html_hei_login). Any users no longer employed with the institution/campus or who no longer require access should be deleted immediately. We will receive electronic notification, and the file of each deleted user will be purged.

On our end, after an intense audit of the paper files, we have identified a number of current authorized users for whom we have no User Authorization Form on file. Each of these individuals can expect to receive an e-mail request from us by month's end requesting them to complete and return a User Authorization Form. Those who do so in a timely manner will experience no interruption in their current access. However, those who do not return the form in a timely manner will have their access terminated.

We encourage all new users, and even experienced users, to take advantage of the HEI training sessions offered on a regular basis. These sessions are led by our various program administrators and guide participants through the steps of accessing queries/reports and sending files. The next training session is planned as a breakout session at the OASFAA Winter Conference on December 11, 2008.