



# CBM00T Transfer Report

## What is it, how to run it

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# Agenda

1 Report Definition

2 Which Courses?

3 Setup

4 Degree Audit

5 Job Sub



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# CBM00T Coordinating Board Definition

The Transfer Report (CBM00T) includes courses for which a student who transfers was not granted academic credit at the receiving institution or was not granted toward the student's major at the receiving institution. The courses meeting the criteria for inclusion in the CBM00T will be reported for transfer students enrolled on the official census date for the first time at the general academic institution to which they have transferred in the fall or spring.

# CBM00T Which Courses?

Identified courses, by student, included in the CBM00T must meet the following criteria:

- They are in the Lower-Division Academic Course Guide Manual (ACGM) or its successor
- They were taken by a student transferring for the first time from a Texas public community college or state college to a university
- The transfer student must have a declared major at the receiving institution

# CBM00T Courses

- The transfer student did not change their major area of concentration (four- digit CIP) between the time of admissions (major listed on Apply Texas application) and the census date
- At least 50% of the awarded SCH for the course did not transfer and apply to the student's major at the receiving institution. For example, if 2 SCH from a 3 SCH course transferred and applied toward the student's major, then the course would not need to be reported.

# CBM00T Frequency

The CBM00T is an annual report, covering the previous academic year.

First Time Transfer Student Cohort	Data Submission Due	Data Submission Certified
Fall 2020	November 1, 2020	December 1, 2020
Fall 2020*, Spring 2021	October 15, 2021	November 15, 2021
Fall 2021, Spring 2022	October 15, 2022	November 15, 2022



# Texas, public, 2-year

## How we identify Texas, public, 2-year institutions

- First step FICE code – entered on STVSBGI from Appendix A of the reporting manual

Source/Background Institution Code Validation STVSBGI 9.3 (BidTCC)

Active filters: Source or Background Institution: 003668 [Clear All](#) [Filter Again](#)

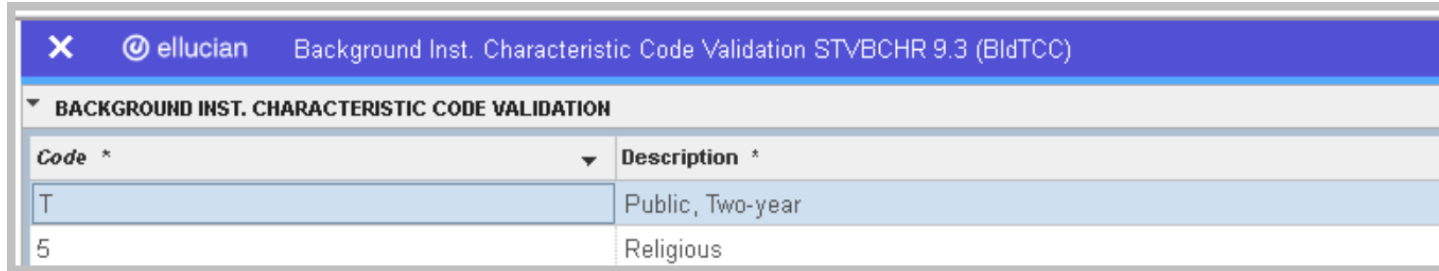
Source or Background Institution *	Description *	Type *	Source Indicator	Admissions Request	Admissions Request Description	Electronic	FICE	Voice Response Message
003668	Wharton County Junior College	College	<input checked="" type="checkbox"/>	CT01	College Transcript	EDI	003668	

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# Public, 2-year

Next, we need an attribute to identify a Public, 2-year

- Create a Background Institution Characteristic Code on STVBCHR



The screenshot shows a software window titled "Background Inst. Characteristic Code Validation STVBCHR 9.3 (BldTCC)". Below the title bar is a section header "BACKGROUND INST. CHARACTERISTIC CODE VALIDATION". Underneath is a table with two columns: "Code \*" and "Description \*". The table contains two rows: one with "T" and "Public, Two-year", and another with "5" and "Religious".

Code *	Description *
T	Public, Two-year
5	Religious

# Tell the process the attribute

Create a GTVSDAX entry (CBMTPUB2YR) so the process knows the characteristic code

The screenshot shows the 'Crosswalk Validation GTVSDAX 9.0 (BldTCC)' application window. The main section is titled 'CROSSWALK VALIDATION'. Under 'Active filters', the code 'CBMTPUB2YR' is selected, with a 'Clear All' button. The 'Internal' section contains the following fields:

- Code: CBMTPUB2YR
- Sequence: (empty)
- Group: TXCN
- External Code: T
- Description: College is Public, 2 YR

The right-hand side of the form includes:

- Concept: (empty)
- Translation Code: (empty)
- Reporting Date: (empty)
- Sys: S (dropdown menu) ... Student
- Sys Required

The 'Details' section at the bottom shows a 'Comments' field with the text: 'Created for the CBM00T to identify a college as a Public, 2-Year institution. Entered on SOABGIY.'

# Attach the attribute

For each Texas, public, 2-year attach the attribute in SOABGIY

The screenshot shows a web application interface with a blue header bar containing a close button (X), the Ellucian logo, and the text "Source/Background Institution Year SOABGIY 9.3.10 (BldTCC)". Below the header, the text "Source or Background Institution: 003668 Wharton County Junior College Year: 2020" is displayed. A section titled "CHARACTERISTICS" is expanded to show a table with two columns: "Characteristic \*" and "Description". The table contains one row with an empty "Characteristic \*" cell and a "Public, Two-year" entry in the "Description" cell. At the bottom of the table, there are navigation controls including arrows, a page indicator "1 of 1", and a "10 Per Page" dropdown menu.

Characteristic *	Description
	Public, Two-year

# Texas

Use SOASBGI to provide institutions a Texas address

ellucian Source/Background Institution Base SOASBGI 9.3.12 (BldTCC)

Source or Background Institution: 003668 Wharton County Junior College

**SOURCE OR BACKGROUND INSTITUTION ADDRESS**

House Number	<input type="text"/>	City	<input type="text" value="Wharton"/>
Street Line 1	<input type="text" value="911 Boling Hwy"/>	State or Province	<input type="text" value="TX"/> ... Texas
Street Line 2	<input type="text"/>	ZIP or Postal Code	<input type="text" value="77480"/> ...
Street Line 3	<input type="text"/>	County	<input type="text" value="48481"/> ... Wharton (TX)
Street Line 4	<input type="text"/>	Nation	<input type="text"/> ...

# CBM00T Reason Codes

From the CB definition, populate SZVCBTR with reason codes

CBM00T Reason Code *	CBM00T Description *
1	Course Outside Degree Req.
2	Minimum Grade Req.
3	Repeated Course
4	Exceeded Max Transfer Hrs
5	Other

# Academic Course Guide Manual (ACGM) Courses

The install process created the entries in SZAACGM

Term: \* 202010 ... FALL 2020A

ACGM COURSES

From Term 202010 Copy

ACGM Subject *	ACGM Course Number *	ACGM Title
ACCT	2301	Principles of Financial Accounting
ACCT	2302	Principles of Managerial Accounting
ACCT	2401	Principles of Financial Accounting
ACCT	2402	Principles of Managerial Accounting

# Degree Audit

To identify students who have transfer courses that were not used towards their degree plan

- CAPP
- Degree Works



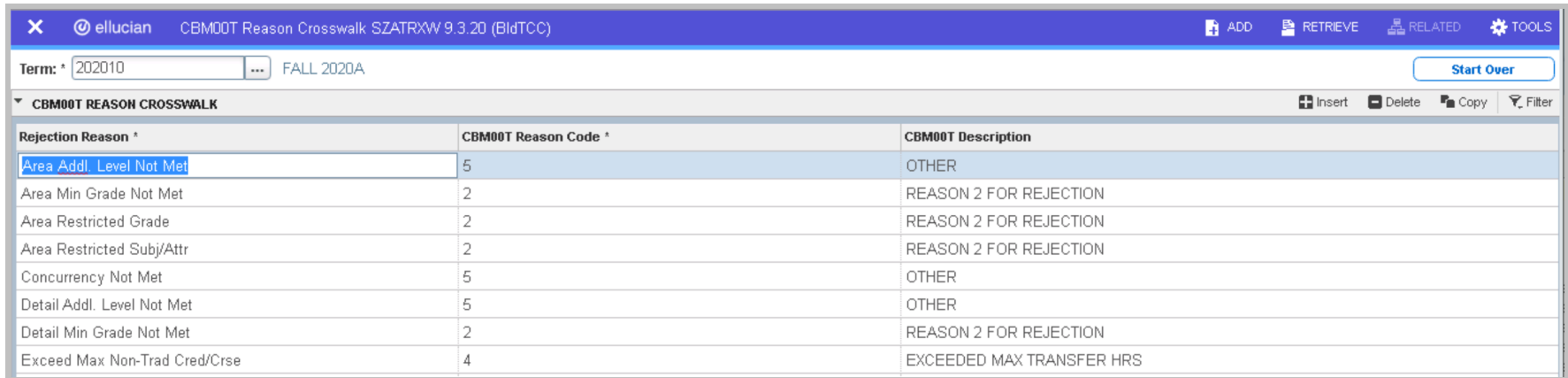
# Table SORTDAD – client populated

Clients run either CAPP or Degree Works to create the initial selection group and populate SORTDAD with a local script

- Load table SORTDAD (schema owner SATURN)
- Two key columns
  - SORTDAD\_REJECTION\_REASON – text reason from the degree audit system for why the class was not used. Typically from Degree Works.
  - SORTDAD\_CBTR\_CODE – CBM00T Item 10 (1 – 5)

# Rejection Reason to CBM00T Reason Code

If you populate SORTDAD\_REJECTION\_REASON, there is a crosswalk to the Item 10 code on SZATRXW



The screenshot shows a web application interface with a blue header bar. The header contains the Ellucian logo, the text 'ellucian', and the title 'CBM00T Reason Crosswalk SZATRXW 9.3.20 (BlidTCC)'. On the right side of the header are icons for 'ADD', 'RETRIEVE', 'RELATED', and 'TOOLS'. Below the header is a search area with 'Term: \* 202010' and 'FALL 2020A', and a 'Start Over' button. The main content area is titled 'CBM00T REASON CROSSWALK' and contains a table with three columns: 'Rejection Reason \*', 'CBM00T Reason Code \*', and 'CBM00T Description'. The table lists eight rows of data, with the first row highlighted in blue.

Rejection Reason *	CBM00T Reason Code *	CBM00T Description
Area Addl. Level Not Met	5	OTHER
Area Min Grade Not Met	2	REASON 2 FOR REJECTION
Area Restricted Grade	2	REASON 2 FOR REJECTION
Area Restricted Subj/Attr	2	REASON 2 FOR REJECTION
Concurrency Not Met	5	OTHER
Detail Addl. Level Not Met	5	OTHER
Detail Min Grade Not Met	2	REASON 2 FOR REJECTION
Exceed Max Non-Trad Cred/Crse	4	EXCEEDED MAX TRANSFER HRS

# Student Audit Data – SZATDAD

Once SORTDAD is populated, you can review/edit the data on SZATDAD

Student Audit Data SZATDAD 9.3.20 (BldTCC)

ID: TCC036431 Rogers, Roy [Start Over](#)

**STUDENT AUDIT DATA** [Insert](#) [Delete](#) [Copy](#) [Filter](#)

Term	Subject	Course	Rejection Reason	CBM00T Reason Code	CBM00T Description	SBGI Code	SBGI Description
303410	AGRI	1311		4	Exceeded Max Transfer Hrs	003549	Blinn College
303410	AGRI	1315	Invalid Course Level			003549	Blinn College
303410	ENGL	1301		5	Other	003549	Blinn College
303420	AGRI	1307		5	Other	003549	Blinn College

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# CBM00T Job Sub Process SZRCBMT

Number	Parameter	Values
01	Fall Term	Enter the Fall term to be reported in YYYYNN format. Required parameter. Multiple values allowed.
02	Spring Term	Enter the Spring term to be reported in YYYYNN format. Optional parameter. Multiple values allowed.
03	Year	Enter the calendar year in which the report is due. Used for Item 6 on the report. YYYY format. Required.
04	FICE Code	Enter the FICE code for your institution. Used for Item 2. Required.
05	Id Prefix	Enter the substitute character for the first position of the Banner ID for students without an SSN. THECB does not accept special characters such as "@". Required.
06	Employee Name	Name of employee responsible for submitting the report. Used in header record of the report. Required.
07	Employee Email Address	Email address of employee submitting the report. Used in header record of the report. Required.
08	Filename	You can enter the path and filename for the report, with a 30 character maximum or you can leave the filename blank and the program will use "szrcbmt_xxxxxx.ext".

Run the CBM0C1 for the fall and spring terms in parms 01, 02

# Known Issues

- CR-000184570 CBM00T missing spring population due to semester. Planned release for July.

# Discussion

- What works, what doesn't, suggestions for improvements

# Community

The key location to interact with other TCC clients

If you already have access to the Ellucian Customer Center or the Software Download area, you also have access to Community

<https://login.ellucian.com/>

If you are a new user and need a HUB account, use this link first. You'll provide your email address once there.

<https://clientapps.ellucian.com/signup>

# Community

The key location to interact with other TCC clients

Once you're in Community, browse the forums, choose subforums, then Texas Connection Private Forum.

A video with basics of using Community is available via this link: <https://ellucian.box.com/s/rchowb4ky3z7m7w6sos9ipn36d2xoycj>



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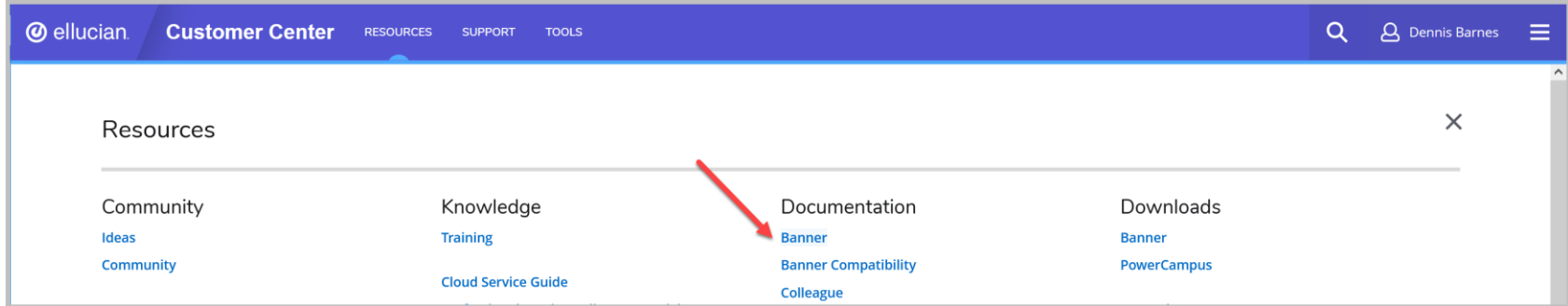
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# Documentation

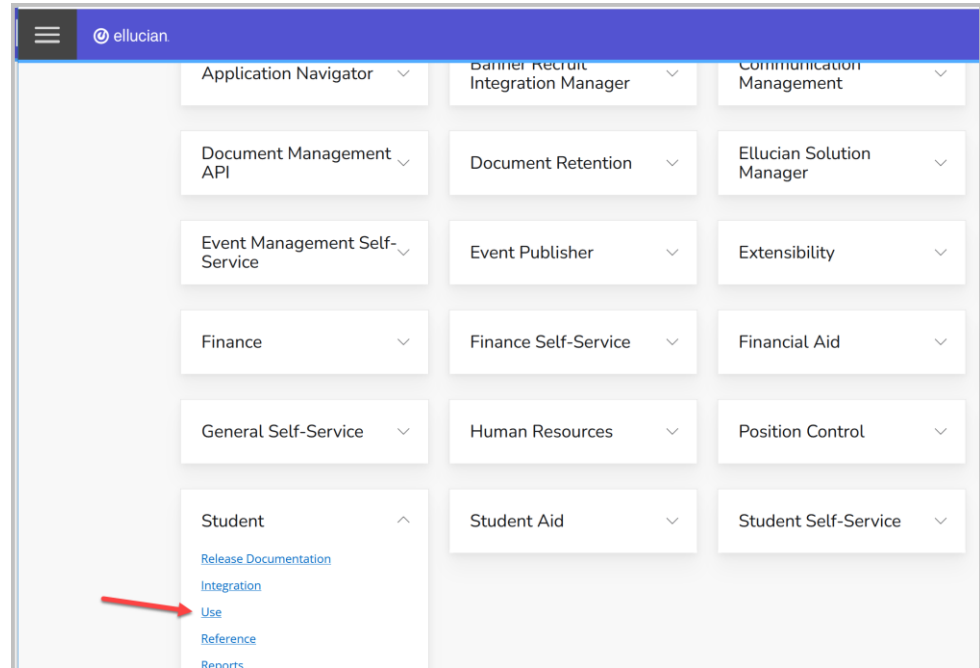
TCC Documentation is now distributed just like baseline

- In the Customer Center, go to Resources and choose Banner under the Documentation column



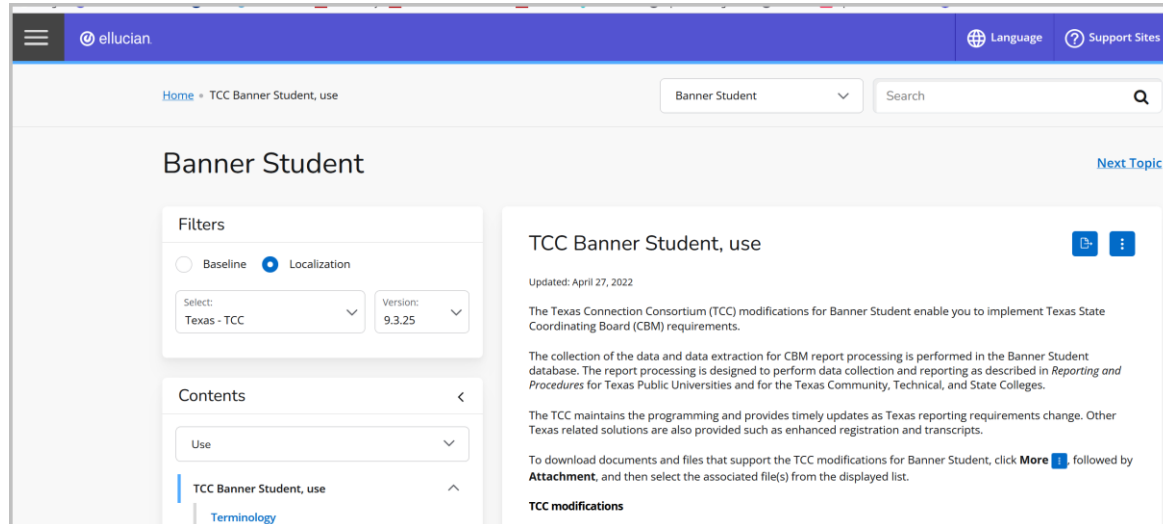
# Documentation

- On the Banner page, scroll down to Student and use the down arrow to show the options and choose Use



# Documentation

- In the upper left corner, click Localization, then select Texas –TCC in the drop down list. The version will default to the most recent version.
- To download documents and files that support the TCC modifications for Banner Student, click More, followed by Attachment, and then select the associated file(s) from the displayed list.





Thank You.

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