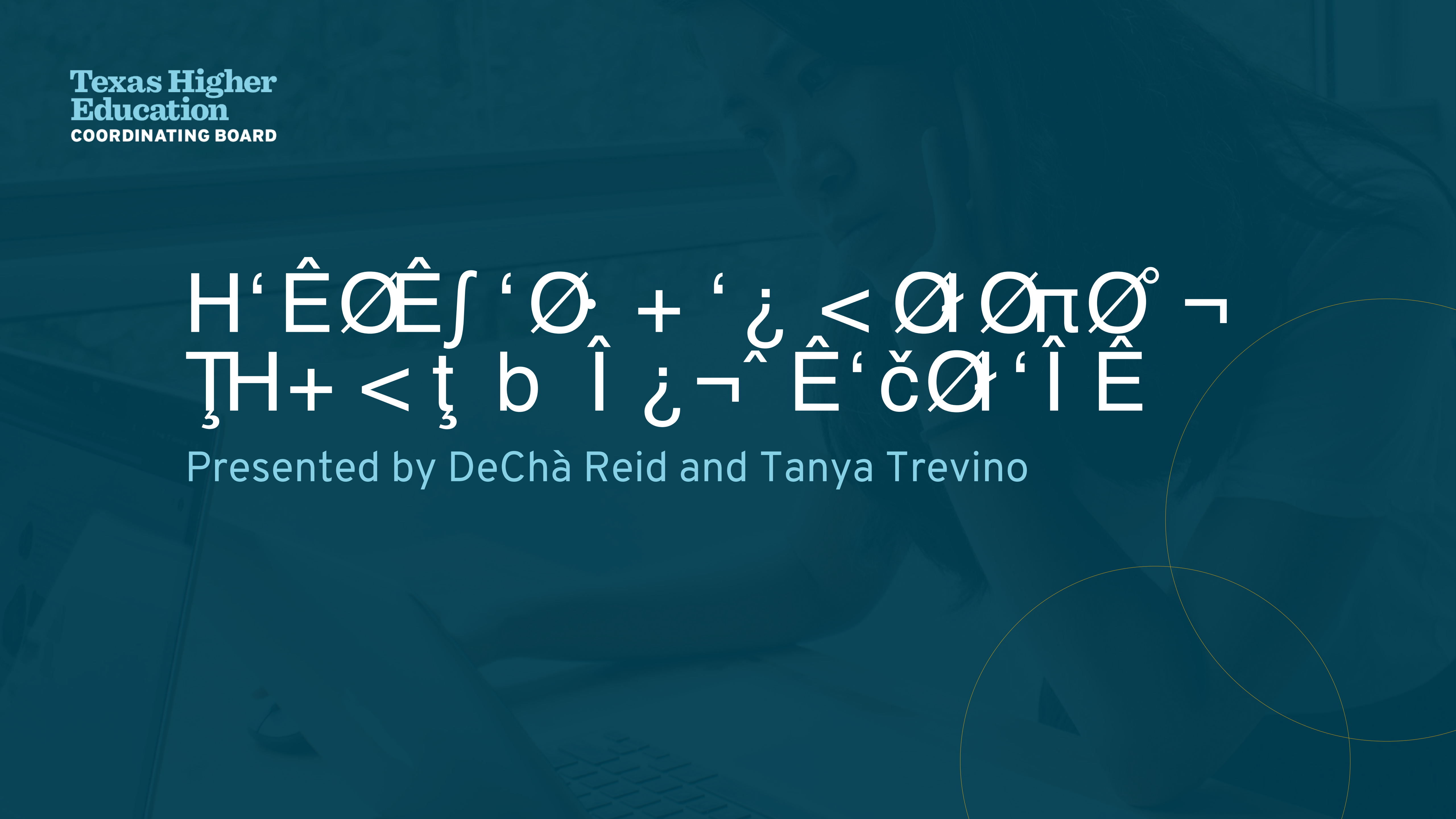

Texas Higher Education
COORDINATING BOARD

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Presented by DeChà Reid and Tanya Trevino

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New FAD Submission Portal

Transition Timeline

FY 2023 New data elements and Reporting dates

Questions

New FAD Submission Portal

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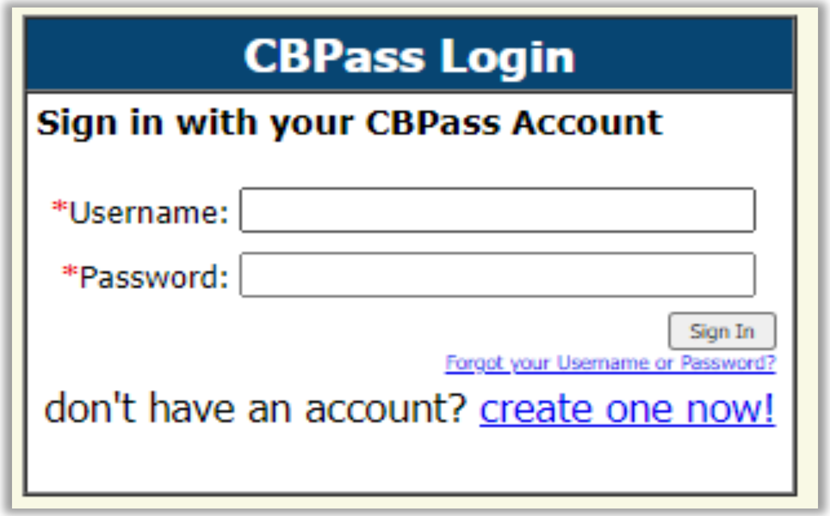
Log in using your existing credentials on the CBPass Login Screen.



CBPass Login

Sign in with your CBPass Account

*Username:

*Password:

Sign In
Forgot your Username or Password?

don't have an account? create one now!

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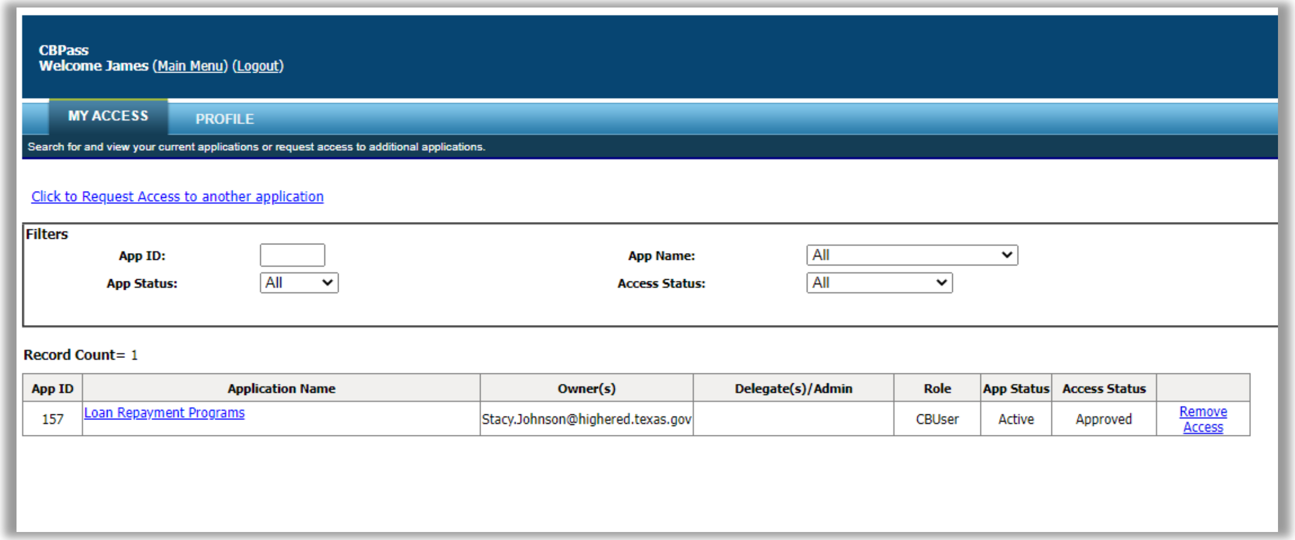
1

On this landing page, you’ll click the link close to the top of the page to Request Access to Another Application, taking you to the Request Access page

2

On the Request Access page, select Data Submission Portal (temporarily labeled EDC Portal) from the drop-down menu



CBPass
Welcome James (Main Menu) (Logout)

MY ACCESS
PROFILE

Search for and view your current applications or request access to additional applications.

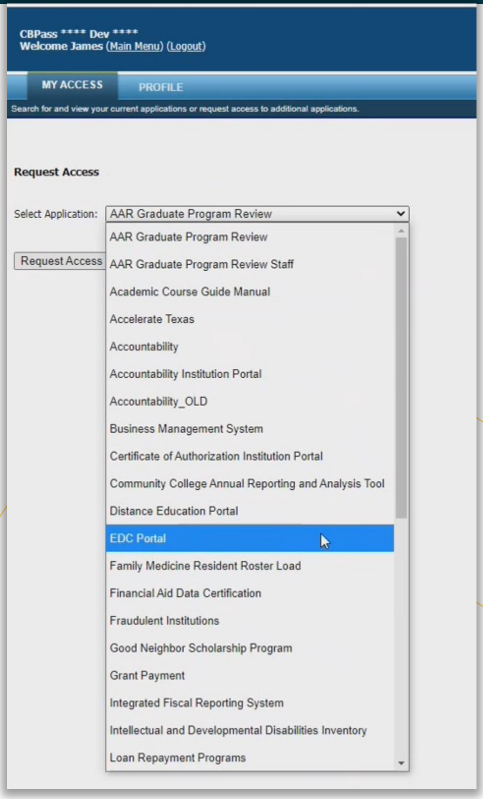
Click to Request Access to another application

Filters

App ID:
App Name: All
App Status: All
Access Status: All

Record Count= 1

App ID	Application Name	Owner(s)	Delegate(s)/Admin	Role	App Status	Access Status	
157	Loan Repayment Programs	Stacy.Johnson@highered.texas.gov		CBUser	Active	Approved	Remove Access



CBPass **** Dev ****
Welcome James (Main Menu) (Logout)

MY ACCESS
PROFILE

Search for and view your current applications or request access to additional applications.

Request Access

Select Application: AAR Graduate Program Review

Request Access
AAR Graduate Program Review
AAR Graduate Program Review Staff
Academic Course Guide Manual
Accelerate Texas
Accountability
Accountability Institution Portal
Accountability_OLD
Business Management System
Certificate of Authorization Institution Portal
Community College Annual Reporting and Analysis Tool
Distance Education Portal
EDC Portal
Family Medicine Resident Roster Load
Financial Aid Data Certification
Fraudulent Institutions
Good Neighbor Scholarship Program
Grant Payment
Integrated Fiscal Reporting System
Intellectual and Developmental Disabilities Inventory
Loan Repayment Programs

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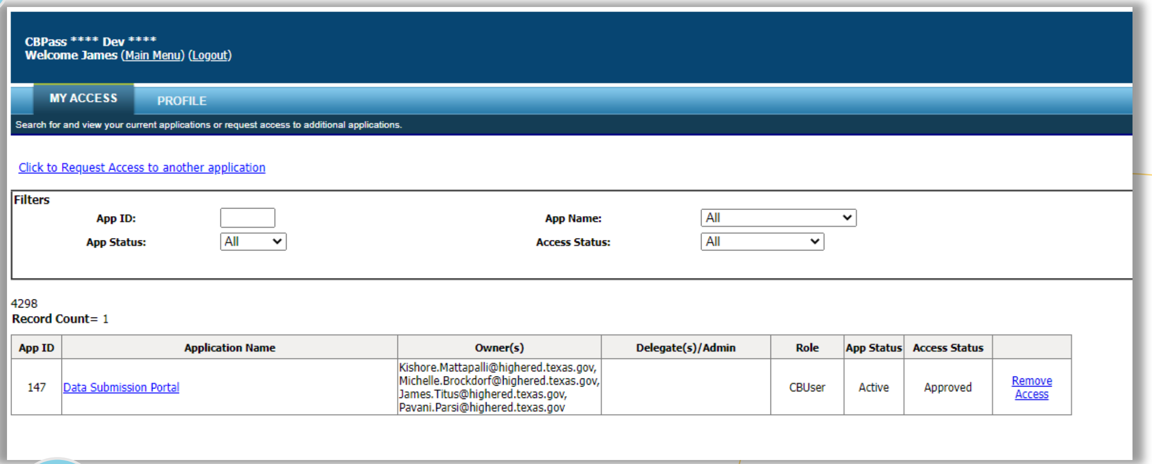
1

Once your access request is approved, click Data Submission Portal from your list of applications on the CBPass landing page (a).

2

The link will open in a new tab and take you to the Data Submission Portal splash page (b).

a



CBPass **** Dev ****
Welcome James (Main Menu) (Logout)

Search for and view your current applications or request access to additional applications.

Click to Request Access to another application

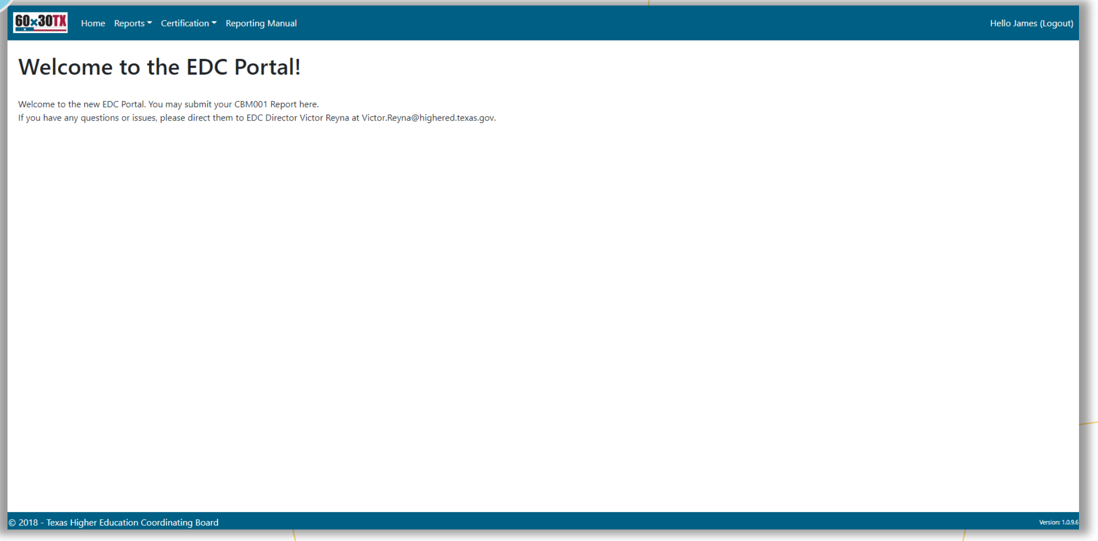
Filters

App ID:
App Status: All
App Name: All
Access Status: All

4298
Record Count= 1

App ID	Application Name	Owner(s)	Delegate(s)/Admin	Role	App Status	Access Status	
147	Data Submission Portal	Kishore.Mattapalli@highered.texas.gov, Michelle.Brockdorf@highered.texas.gov, James.Titus@highered.texas.gov, Pavani.Parsi@highered.texas.gov		CBUser	Active	Approved	Remove Access

b



Welcome to the EDC Portal!

Welcome to the new EDC Portal. You may submit your CBM001 Report here.
If you have any questions or issues, please direct them to EDC Director Victor Reyna at Victor.Reyna@highered.texas.gov.

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Version: 1.0.9.6

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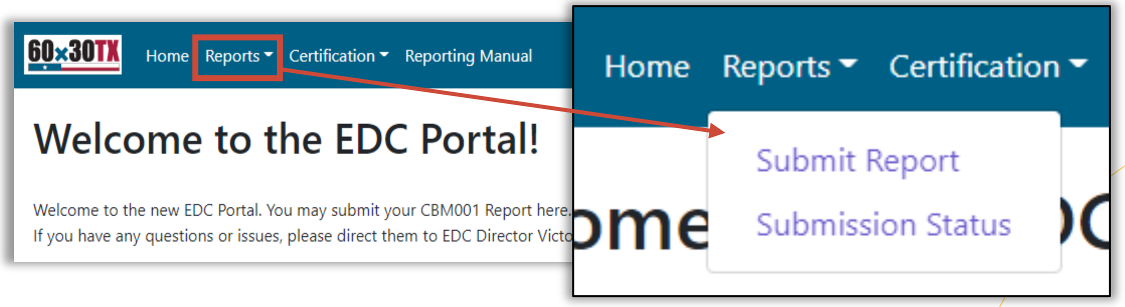
1

Reports drop-down menu has links to Submit Report and view Submission Status


60x30TX
Home
Reports
Certification
Reporting Manual
Home
Reports
Certification
Submit Report
Submission Status

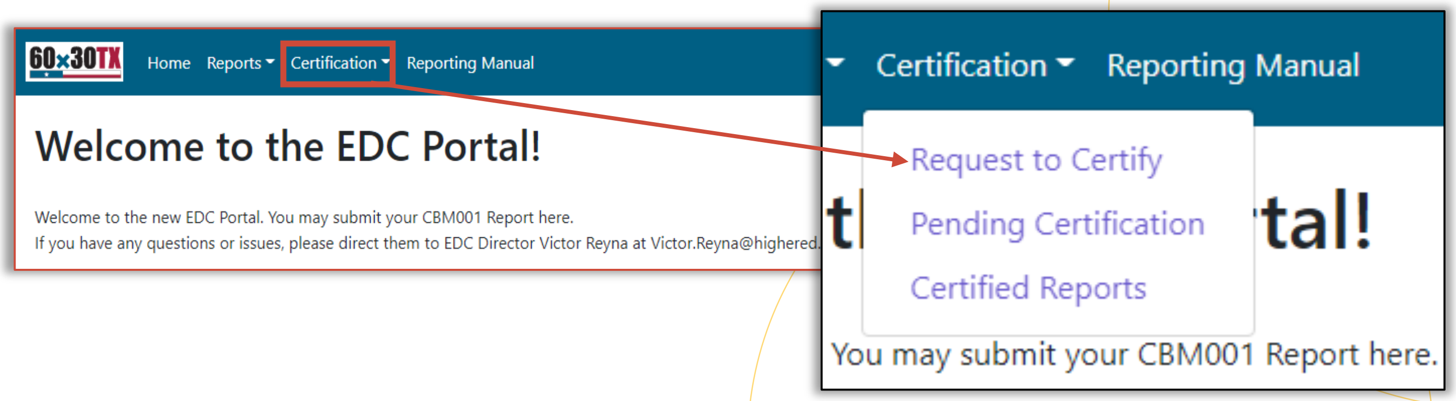
Welcome to the EDC Portal!

Welcome to the new EDC Portal. You may submit your CBM001 Report here.
If you have any questions or issues, please direct them to EDC Director Victo

2

Certification drop-down menu has links to:

- Request to Certify
- Pending Certification
- Certified Reports


60x30TX
Home
Reports
Certification
Reporting Manual
Certification
Reporting Manual
Request to Certify
Pending Certification
Certified Reports

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You may submit your CBM001 Report here.

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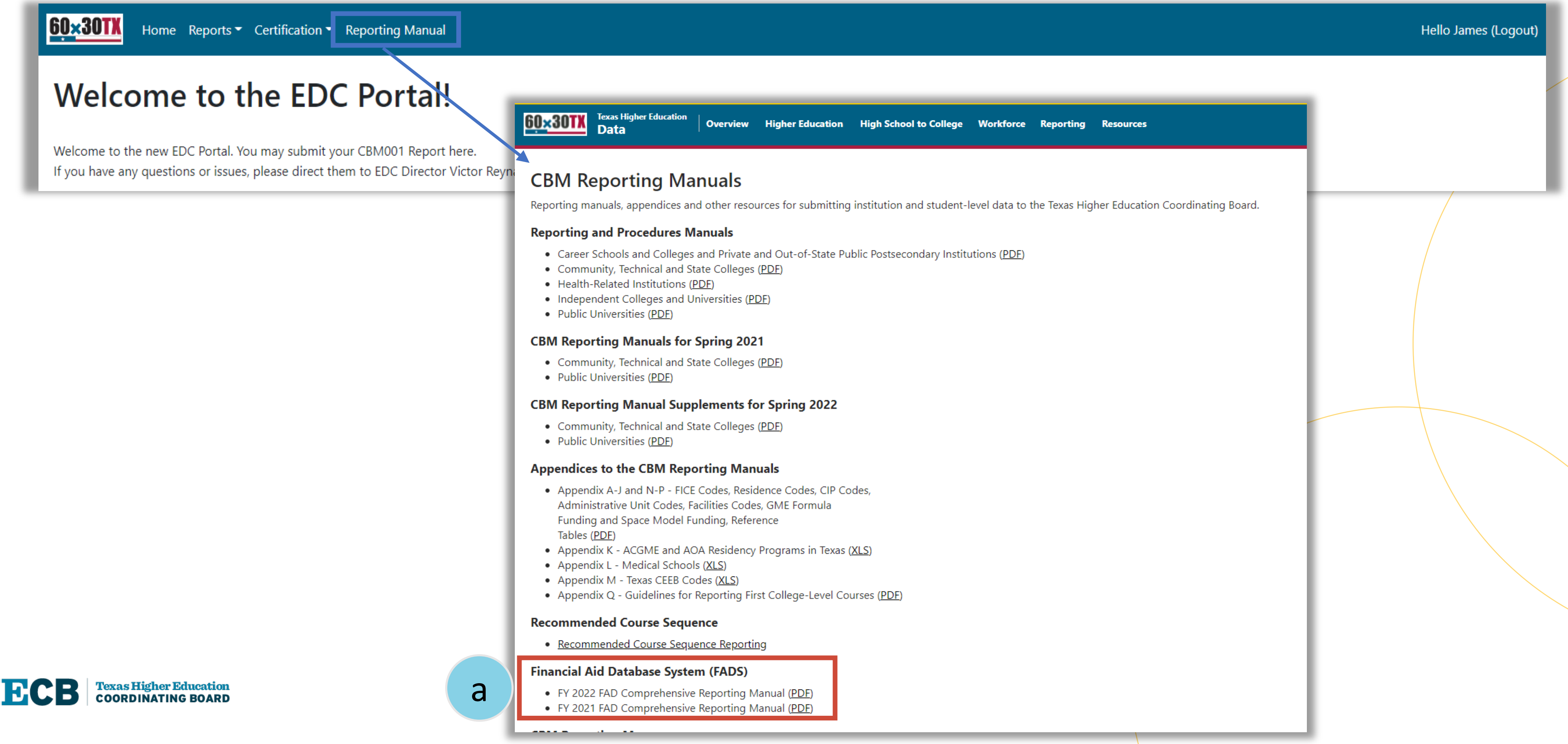
1

The Reporting Manual link opens the THECB Reporting Manuals website in a new tab, where you can access the current FADS manuals (a).


60x30TX
Home
Reports
Certification
Reporting Manual
Hello James (Logout)
60x30TX
Texas Higher Education Data
Overview
Higher Education
High School to College
Workforce
Reporting
Resources

Welcome to the EDC Portal!

Welcome to the new EDC Portal. You may submit your CBM001 Report here.
If you have any questions or issues, please direct them to EDC Director Victor Reyn

CBM Reporting Manuals

Reporting manuals, appendices and other resources for submitting institution and student-level data to the Texas Higher Education Coordinating Board.

Reporting and Procedures Manuals

- Career Schools and Colleges and Private and Out-of-State Public Postsecondary Institutions (PDF)
- Community, Technical and State Colleges (PDF)
- Health-Related Institutions (PDF)
- Independent Colleges and Universities (PDF)
- Public Universities (PDF)

CBM Reporting Manuals for Spring 2021

- Community, Technical and State Colleges (PDF)
- Public Universities (PDF)

CBM Reporting Manual Supplements for Spring 2022

- Community, Technical and State Colleges (PDF)
- Public Universities (PDF)

Appendices to the CBM Reporting Manuals

- Appendix A-J and N-P - FICE Codes, Residence Codes, CIP Codes, Administrative Unit Codes, Facilities Codes, GME Formula Funding and Space Model Funding, Reference Tables (PDF)
- Appendix K - ACGME and AOA Residency Programs in Texas (XLS)
- Appendix L - Medical Schools (XLS)
- Appendix M - Texas CEEB Codes (XLS)
- Appendix Q - Guidelines for Reporting First College-Level Courses (PDF)

Recommended Course Sequence

- Recommended Course Sequence Reporting

a

Financial Aid Database System (FADS)

- FY 2022 FAD Comprehensive Reporting Manual (PDF)
- FY 2021 FAD Comprehensive Reporting Manual (PDF)

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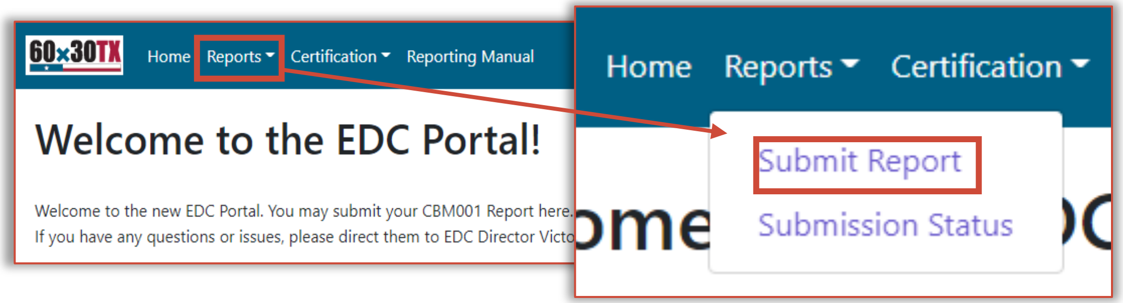
1

To begin the report submission process, select Submit Report from the Reports drop-down menu. It will open the Submit Report page.



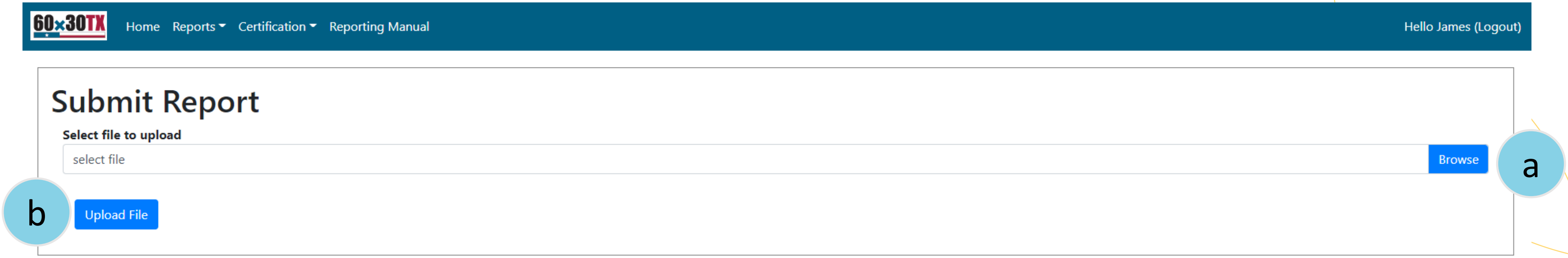
60x30TX
Home
Reports
Certification
Reporting Manual
Home
Reports
Certification
Submit Report
Submission Status

Welcome to the EDC Portal!

Welcome to the new EDC Portal. You may submit your CBM001 Report here.
If you have any questions or issues, please direct them to EDC Director Victo

2

Use the Browse button (a) to open your system file viewer and select the file you want to upload. Once you've selected the correct file, click Upload File (b)



60x30TX
Home
Reports
Certification
Reporting Manual
Hello James (Logout)
Browse
a
b
Upload File

Submit Report

Select file to upload

select file

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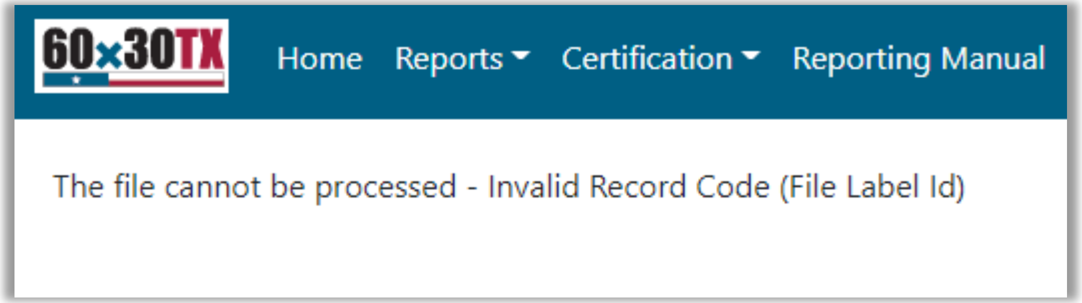
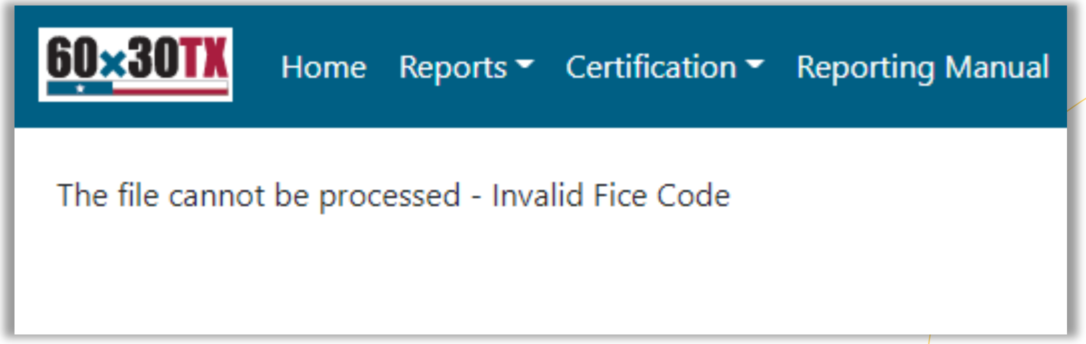
1 Errors in the File Label ID or Fice code will display an error. Correct the error and resubmit on the Submit Report Page


60x30TX
Home
Reports
Certification
Reporting Manual

The file cannot be processed - Invalid Record Code (File Label Id)


60x30TX
Home
Reports
Certification
Reporting Manual

The file cannot be processed - Invalid Fice Code

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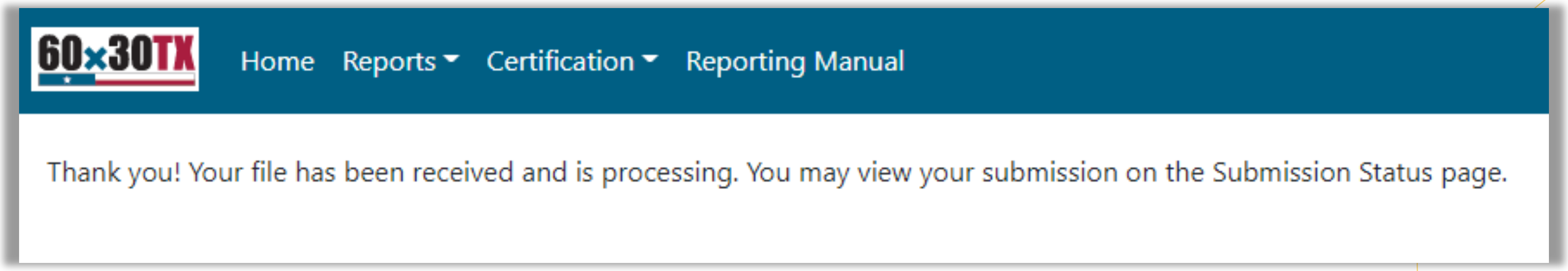
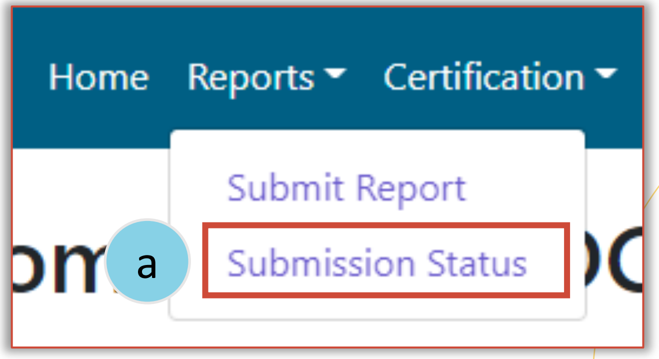
1 Once your submission is accepted, you’ll see this confirmation message. To view your submission, go to the Submission Status page (a).


60x30TX
Home
Reports
Certification
Reporting Manual

Thank you! Your file has been received and is processing. You may view your submission on the Submission Status page.


Home
Reports
Certification
Submit Report
a
Submission Status

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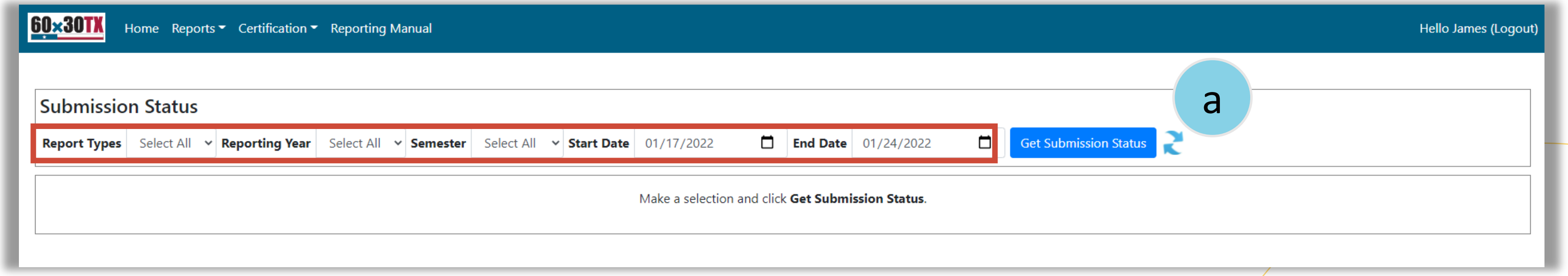
1

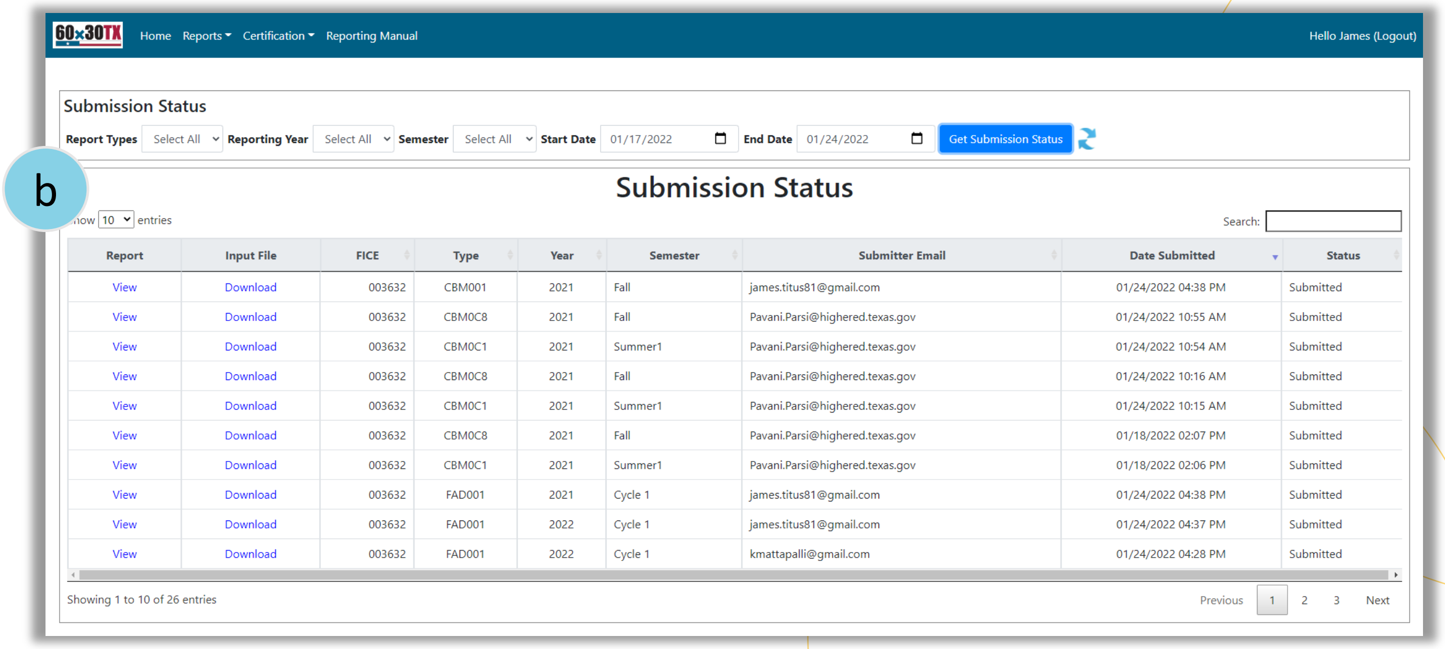
To view submissions, select the values from each category, and click Get Submission Status (a) to generate the table of results (b)


60x30TX
Home
Reports
Certification
Reporting Manual
Hello James (Logout)
a
Get Submission Status

Submission Status

Report Types Select All **Reporting Year** Select All **Semester** Select All **Start Date** 01/17/2022 **End Date** 01/24/2022

Make a selection and click **Get Submission Status**.


60x30TX
Home
Reports
Certification
Reporting Manual
Hello James (Logout)
b
Get Submission Status
Previous
1
2
3
Next

Submission Status

Report Types Select All **Reporting Year** Select All **Semester** Select All **Start Date** 01/17/2022 **End Date** 01/24/2022

Submission Status

Show 10 entries

Search:

Report	Input File	FICE	Type	Year	Semester	Submitter Email	Date Submitted	Status
View	Download	003632	CBM001	2021	Fall	james.titus81@gmail.com	01/24/2022 04:38 PM	Submitted
View	Download	003632	CBM0C8	2021	Fall	Pavani.Parsi@highered.texas.gov	01/24/2022 10:55 AM	Submitted
View	Download	003632	CBM0C1	2021	Summer1	Pavani.Parsi@highered.texas.gov	01/24/2022 10:54 AM	Submitted
View	Download	003632	CBM0C8	2021	Fall	Pavani.Parsi@highered.texas.gov	01/24/2022 10:16 AM	Submitted
View	Download	003632	CBM0C1	2021	Summer1	Pavani.Parsi@highered.texas.gov	01/24/2022 10:15 AM	Submitted
View	Download	003632	CBM0C8	2021	Fall	Pavani.Parsi@highered.texas.gov	01/18/2022 02:07 PM	Submitted
View	Download	003632	CBM0C1	2021	Summer1	Pavani.Parsi@highered.texas.gov	01/18/2022 02:06 PM	Submitted
View	Download	003632	FAD001	2021	Cycle 1	james.titus81@gmail.com	01/24/2022 04:38 PM	Submitted
View	Download	003632	FAD001	2022	Cycle 1	james.titus81@gmail.com	01/24/2022 04:37 PM	Submitted
View	Download	003632	FAD001	2022	Cycle 1	kmattapalli@gmail.com	01/24/2022 04:28 PM	Submitted

Showing 1 to 10 of 26 entries

Note: Users can only see reports and input files for their FICE code and report type

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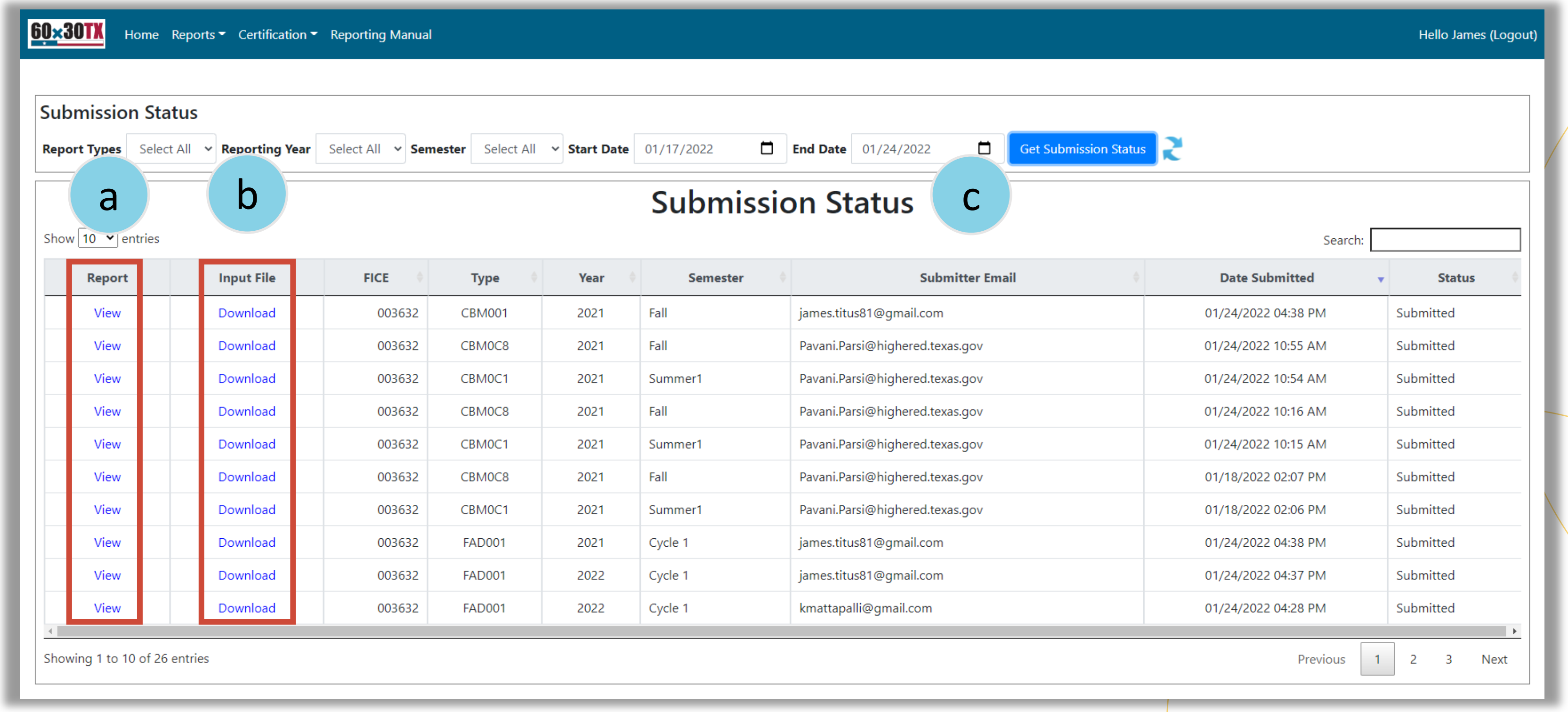
1 Report Column- click View to see full report with edit check results (a).

includes PII

2 Input File Column- click Download to see full input file that you (or another user) submitted (b).

3 Sort the table by columns using the arrows (c).



Submission Status

Report Types: Select All | Reporting Year: Select All | Semester: Select All | Start Date: 01/17/2022 | End Date: 01/24/2022

Submission Status

Show 10 entries

Search:

Report	Input File	FICE	Type	Year	Semester	Submitter Email	Date Submitted	Status
View	Download	003632	CBM001	2021	Fall	james.titus81@gmail.com	01/24/2022 04:38 PM	Submitted
View	Download	003632	CBM0C8	2021	Fall	Pavani.Parsi@highered.texas.gov	01/24/2022 10:55 AM	Submitted
View	Download	003632	CBM0C1	2021	Summer1	Pavani.Parsi@highered.texas.gov	01/24/2022 10:54 AM	Submitted
View	Download	003632	CBM0C8	2021	Fall	Pavani.Parsi@highered.texas.gov	01/24/2022 10:16 AM	Submitted
View	Download	003632	CBM0C1	2021	Summer1	Pavani.Parsi@highered.texas.gov	01/24/2022 10:15 AM	Submitted
View	Download	003632	CBM0C8	2021	Fall	Pavani.Parsi@highered.texas.gov	01/18/2022 02:07 PM	Submitted
View	Download	003632	CBM0C1	2021	Summer1	Pavani.Parsi@highered.texas.gov	01/18/2022 02:06 PM	Submitted
View	Download	003632	FAD001	2021	Cycle 1	james.titus81@gmail.com	01/24/2022 04:38 PM	Submitted
View	Download	003632	FAD001	2022	Cycle 1	james.titus81@gmail.com	01/24/2022 04:37 PM	Submitted
View	Download	003632	FAD001	2022	Cycle 1	kmattapalli@gmail.com	01/24/2022 04:28 PM	Submitted

Showing 1 to 10 of 26 entries

Previous 1 2 3 Next

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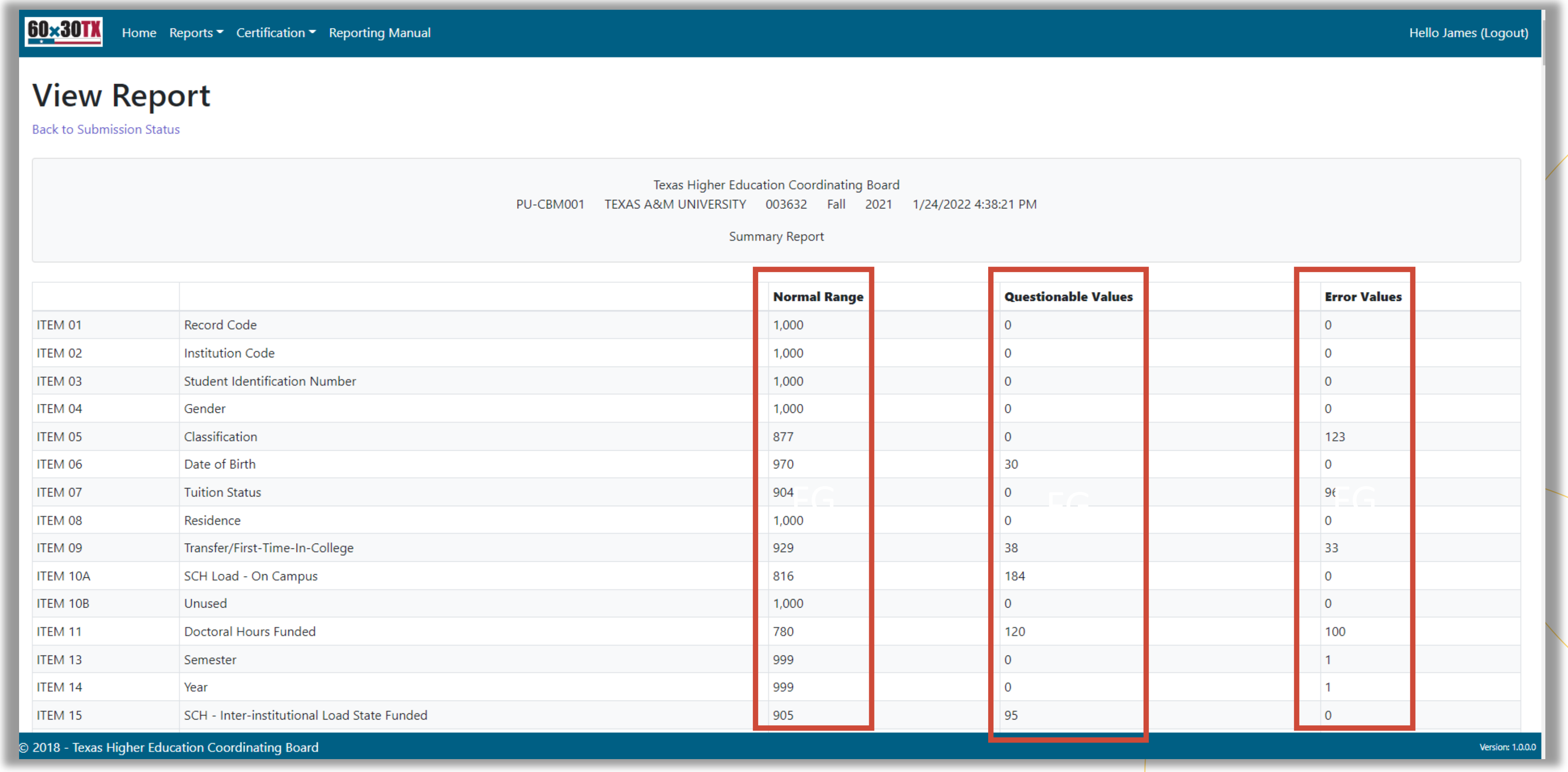
When you view a report, you’ll see a row for each report item, with a column for Normal Range, Questionable Range, and Error Values.



View Report

Back to Submission Status

Texas Higher Education Coordinating Board
PU-CBM001 TEXAS A&M UNIVERSITY 003632 Fall 2021 1/24/2022 4:38:21 PM

Summary Report

		Normal Range	Questionable Values	Error Values
ITEM 01	Record Code	1,000	0	0
ITEM 02	Institution Code	1,000	0	0
ITEM 03	Student Identification Number	1,000	0	0
ITEM 04	Gender	1,000	0	0
ITEM 05	Classification	877	0	123
ITEM 06	Date of Birth	970	30	0
ITEM 07	Tuition Status	904	0	96
ITEM 08	Residence	1,000	0	0
ITEM 09	Transfer/First-Time-In-College	929	38	33
ITEM 10A	SCH Load - On Campus	816	184	0
ITEM 10B	Unused	1,000	0	0
ITEM 11	Doctoral Hours Funded	780	120	100
ITEM 13	Semester	999	0	1
ITEM 14	Year	999	0	1
ITEM 15	SCH - Inter-institutional Load State Funded	905	95	0

Version: 1.0.0.0

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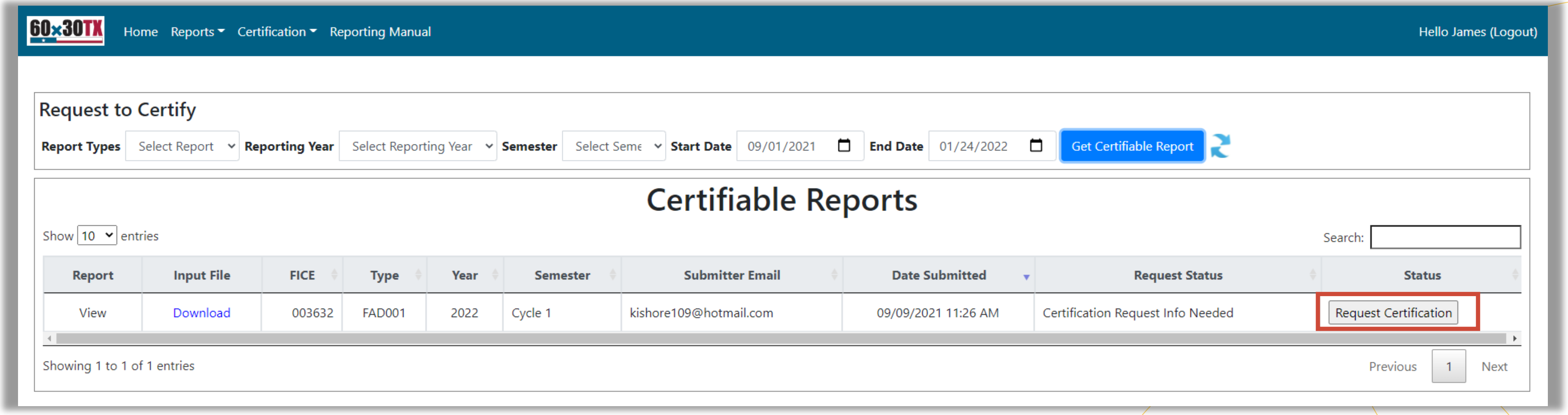
For the report you want to certify with overrides, click “Request Certification” in that row to open the Justifications page for all overrides to errors.


60x30TX
Home
Reports
Certification
Reporting Manual
Hello James (Logout)

Request to Certify

Report Types Select Report **Reporting Year** Select Reporting Year **Semester** Select Seme **Start Date** 09/01/2021 **End Date** 01/24/2022

Get Certifiable Report

Certifiable Reports

Show 10 entries

Search:

Report	Input File	FICE	Type	Year	Semester	Submitter Email	Date Submitted	Request Status	Status
View	Download	003632	FAD001	2022	Cycle 1	kishore109@hotmail.com	09/09/2021 11:26 AM	Certification Request Info Needed	Request Certification

Showing 1 to 1 of 1 entries

Previous
1
Next

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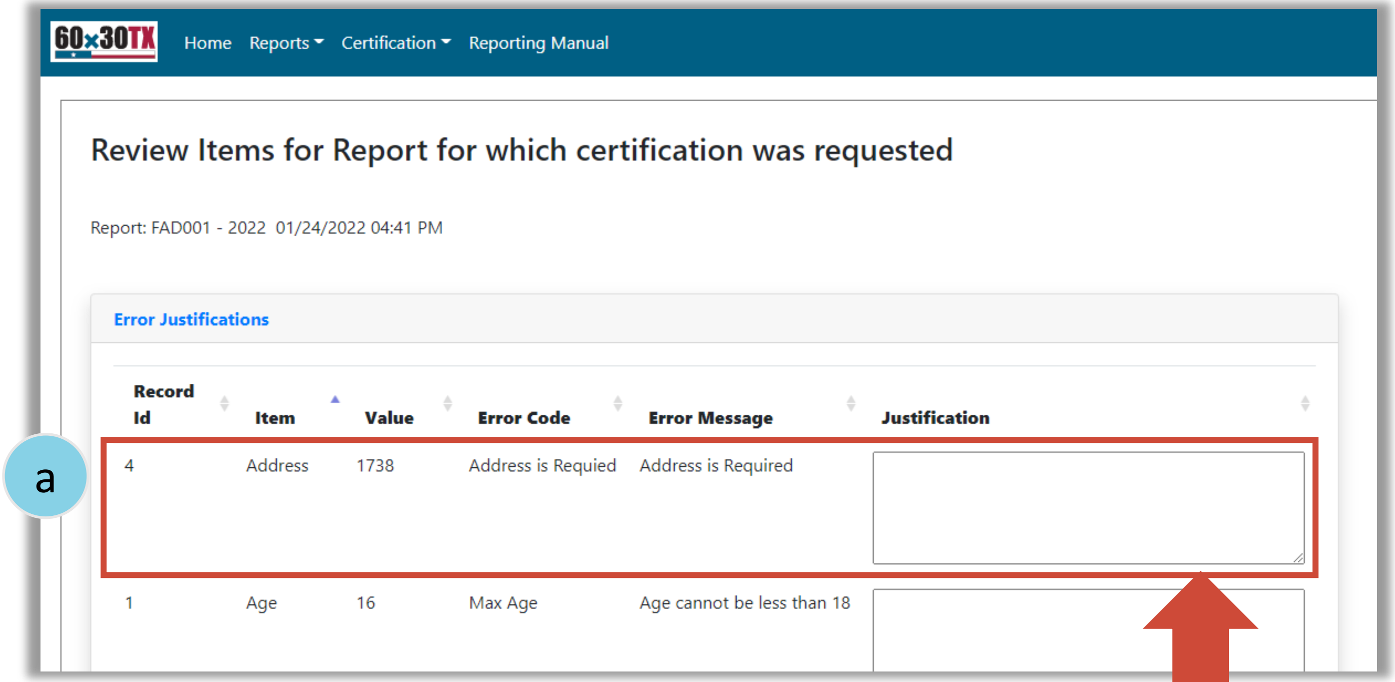

Review Items for Report for which certification was requested

Report: FAD001 - 2022 01/24/2022 04:41 PM

Error Justifications

Record Id	Item	Value	Error Code	Error Message	Justification
4	Address	1738	Address is Requied	Address is Required	
1	Age	16	Max Age	Age cannot be less than 18	

1

Review each line-item error. If the error has a justification, provide the reason in the text box (a). If it is truly an error, correct the error in the FAD file until all errors have been resolved (a).

Note: Use the corner error to drag and reduce or enlarge the justification text box

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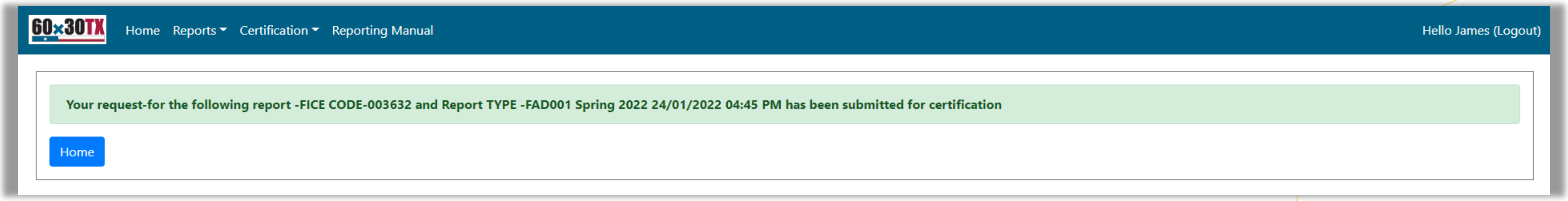
After completing the Justifications and clicking Submit, you’ll get a confirmation of your request submission.


60×30TX
Home
Reports
Certification
Reporting Manual
Hello James (Logout)
Home

Your request-for the following report -FICE CODE-003632 and Report TYPE -FAD001 Spring 2022 24/01/2022 04:45 PM has been submitted for certification

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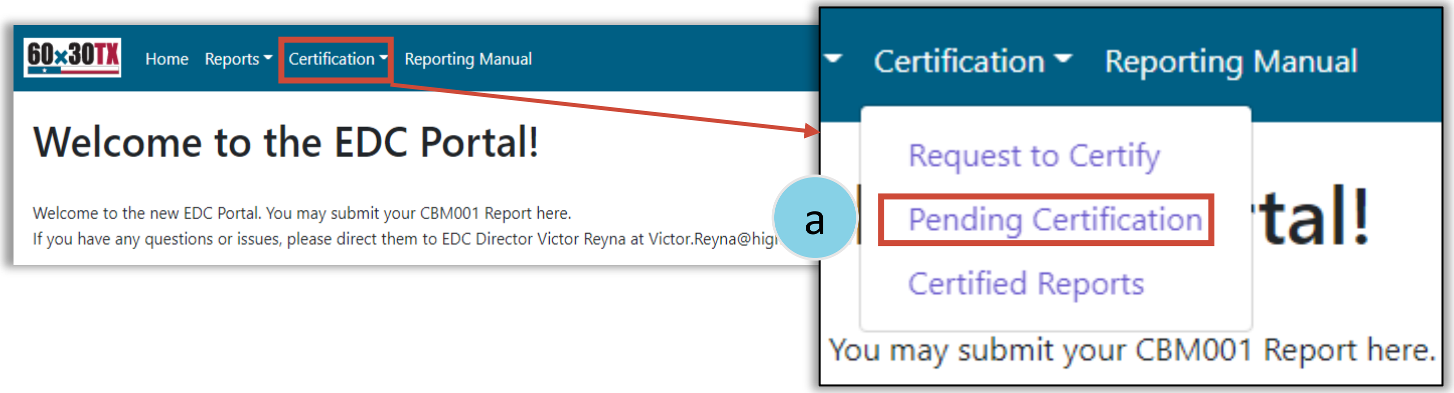
60x30TX
Home
Reports
Certification
Reporting Manual
Certification
Reporting Manual
Request to Certify
Pending Certification
Certified Reports
a

Welcome to the EDC Portal!

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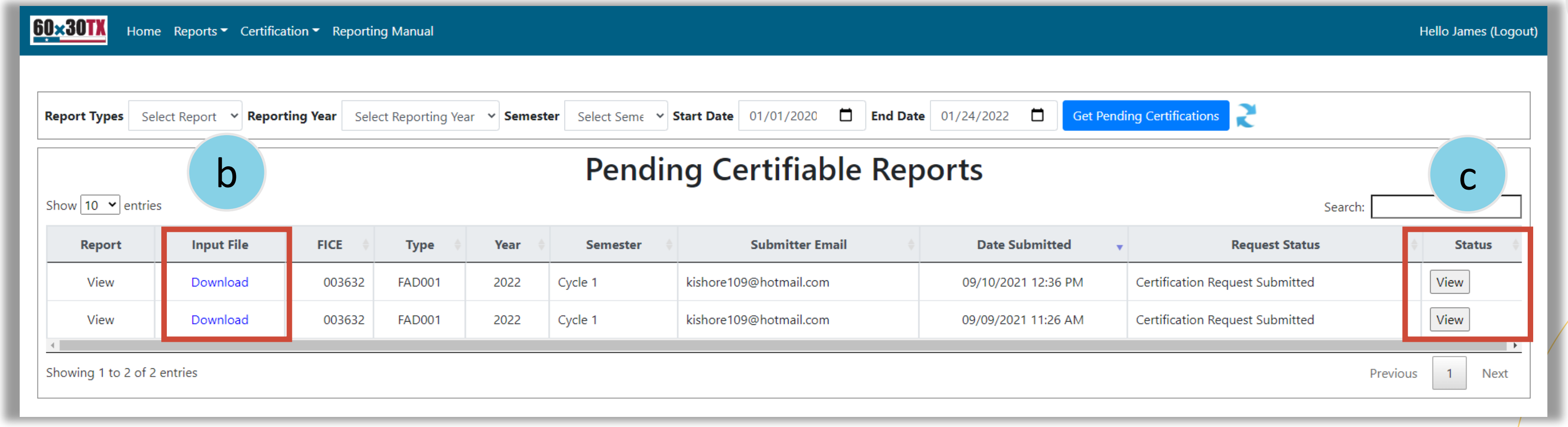
If you have any questions or issues, please direct them to EDC Director Victor Reyna at Victor.Reyna@higi

You may submit your CBM001 Report here.

1 To view reports you've submitted for certification, navigate to the Pending Certification page from the Certification menu (a).


60x30TX
Home
Reports
Certification
Reporting Manual
Hello James (Logout)
Report Types
Select Report
Reporting Year
Select Reporting Year
Semester
Select Seme
Start Date
End Date
Get Pending Certifications
b
c
Show 10 entries
Search:
Previous
1
Next

Start Date 01/01/2020 End Date 01/24/2022

Pending Certifiable Reports

Report	Input File	FICE	Type	Year	Semester	Submitter Email	Date Submitted	Request Status	Status
View	Download	003632	FAD001	2022	Cycle 1	kishore109@hotmail.com	09/10/2021 12:36 PM	Certification Request Submitted	View
View	Download	003632	FAD001	2022	Cycle 1	kishore109@hotmail.com	09/09/2021 11:26 AM	Certification Request Submitted	View

Showing 1 to 2 of 2 entries

2 In the table, you can download the input file (b).

In the status column, you can click View to open a read-only page that includes Justifications. From that page, you can print a pdf of your full report (c).

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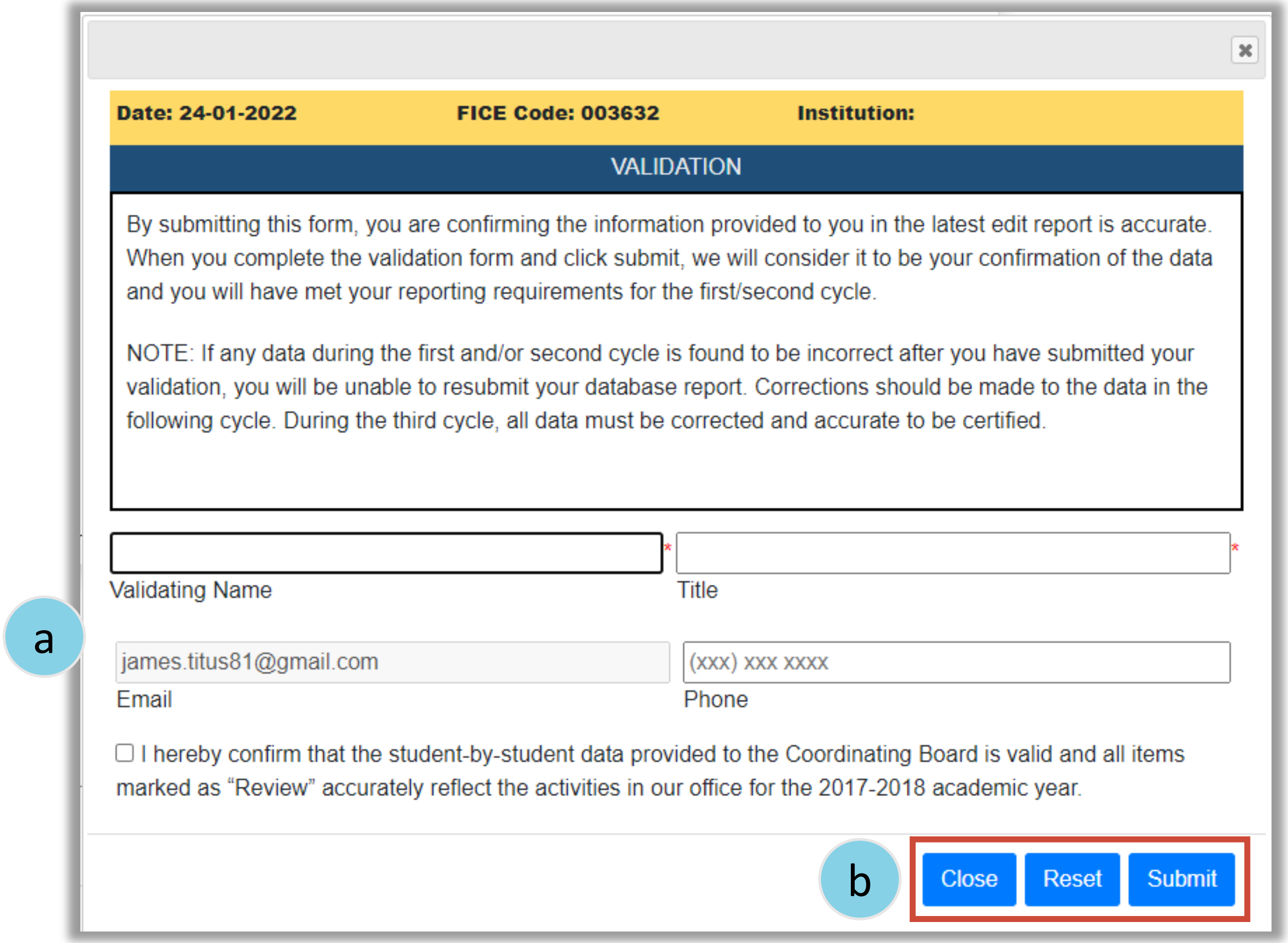

Date: 24-01-2022 **FICE Code: 003632** **Institution:**

VALIDATION

By submitting this form, you are confirming the information provided to you in the latest edit report is accurate. When you complete the validation form and click submit, we will consider it to be your confirmation of the data and you will have met your reporting requirements for the first/second cycle.

NOTE: If any data during the first and/or second cycle is found to be incorrect after you have submitted your validation, you will be unable to resubmit your database report. Corrections should be made to the data in the following cycle. During the third cycle, all data must be corrected and accurate to be certified.

Validating Name *

Title *

Email: james.titus81@gmail.com

Phone: (xxx) xxx xxxx

☐ I hereby confirm that the student-by-student data provided to the Coordinating Board is valid and all items marked as "Review" accurately reflect the activities in our office for the 2017-2018 academic year.

1. After all Justifications have been approved and the FAD file is error-free, you will receive an email to Validate/Certify. A Validation popup window will appear. Read the text and provide the required information (a).

2. When the information is complete, select Submit. You will get an error if you submit without all required information (b).

Transition Timeline

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Reporting Cycle	First Day to Submit	Deadline	Submission Requirements
First	February 15, 2022	April 11, 2022	Deadline to validate student data.
Second	June 15, 2022	Aug. 22, 2022	Deadline to validate student data.
Third	Sept. 28, 2022	Dec. 5, 2022	Deadline to reconcile state program totals and certify student data.

The new data submission process will be available during cycle three.

FY 2023 New Data Elements and Reporting dates

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Reporting Cycle	First Day to Submit	Deadline	Submission Requirements
First	February 15, 2023	April 10, 2023	Deadline to validate student data.
Second	June 14, 2023	Aug. 21, 2023	Deadline to validate student data.
Third	Sept. 27, 2023	*Nov. 13, 2023	Deadline to reconcile state program totals and certify student data.

FAD certifications extending into January cause numerous data analysis delays, therefore cycle three has an earlier deadline date.

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Program Name	Data Element
Texas First Scholarship	#114
Bilingual Education	#115
Educational Aide Exemption	#116
Educational Aide Exemption Matching Requirement	#117

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DeChà Reid, Senior Director

Decha.Reid@highered.texas.gov

Tanya Trevino, System Support Specialist

Tanya.Trevino@highered.texas.gov

FAD Email

FADB@highered.texas.gov

Contact Financial Aid Services (FAS) in one of the following ways:

- FAS Institutional Phone Line: **(844) 792-2640**
- Submit inquiries online through the [CONTACT US](#) web form (select "Financial Aid Question").

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

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