



Texas Higher Education
COORDINATING BOARD
Planning and Accountability

P. O. Box 12788 Austin, Texas 78711 • 1200 East Anderson Lane 78752

MEMORANDUM

March 27, 2009

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To: Health-related Institution Reporting Officials
From: Doug Parker
Subject: Spring 2009 Reporting Manual (replaces Fall 2007 manual)

Modifications to HRI CBM Report editing that are in effect

CBM001 – High School Code is not required if the student is over the age of 25

The high school code in Item #36 is not required for students over the age of 25.

All CBM Reports – Error records are in one edit output report and Questionable records are in another edit output report.

HRI CBM Report editing, Spring 2009

CBM002 – The redesigned TSI report is due June 15, 2009

The reporting manual for the TSI (CBM002) New Format due June 2009 can be found here - <http://www.txhighereddata.org/ReportingManuals.cfm>

Institutions who are charging their students a higher tuition rate once they exceed their undergraduate SCH limit – Semester credit hours that were earned by non-resident students paying the out of state/foreign tuition rate should not count toward their SCH limit. You should check your records to see if students who exceed the limit have any SCH that fall into this category. The SCH earned by non-resident students who paid in-state or reduced rates will still be counted toward their undergraduate SCH limit (TEC 54.014 & 61.0595).



Texas Higher Education
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MEMORANDUM

August 12, 2008

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To: Chief Reporting Officials
From: Doug Parker
Subject: Changes to 2007 Reporting Manual – Additional Fall 2008 CBM Edit Changes

Special CEEB codes created for CBM001 reporting – to be used if an official CEEB code is not available:

449966 – Texas Home Schooled
449977 – Texas GED
449999 – Texas unknown CEEB code
888866 – Out of State Home Schooled
888877 – Out of State GED
888888 – Out of State unknown CEEB code
999999 – Foreign

New PEIMS ID field on the CBM001 – This field will be 9 characters in length and will be the last field in the CBM001. It will be Item #40 for Community Colleges, Item #38 for the Health-related institutions, and Item #37 for the Universities.

The instructions will be - Enter the PEIMS identification number of the student if you collect this information. The PEIMS identification number is a state-approved alternative student identification number provided by TEA to the school districts that is to be used when the student does not provide an SSN. It may be found on the student's high school transcript. This number begins with an 'S' which is then followed by 8 digits. Leave blank if you do not collect this information.

CBM00R (Health-Related Institutions)

New edit check between the Prior Cumulative Residency/Research Years (Item # 16) and a new field provided by the ACGME - Program Requires Prior GME Training. Appendix K has this new field on each of the Residency programs. If Item #16 = 0 and Prior GME Training = 'y' then Error.

Certification – Justification of all "Review" items on the edits is required before certification can be applied. Provide justification on the certification statement (see example in the General Reporting Issues section of the reporting manual at <http://www.txhighereddata.org/ReportingManuals.cfm>).



Texas Higher Education
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Memorandum

May 30, 2008

To: Health-Related Institutions Reporting Officials
From: Doug Parker
Subject: Changes to 2007 Reporting Manual

Modifications to HRI CBM Report editing that are in effect

Student ID editing – Student IDs of spaces or zeros will be flagged as an error.

CBM001 – All institutions are expected to have first-time students

A questionable message will be generated if a Health-related institution reports zero first-time students in any semester. This message will appear on the Edit Summary following the CBM001/CBM004 SCH balancing lines.

CBM001 – Students with Hazlewood exemptions should be Texas residents

A questionable message will be generated if the student has been granted a Hazlewood exemption (Tuition Exemption Code = '01') and the residence is not in Texas (Residence Code > '254').

CBM001 – Identify students affected by the 30 SCH Undergraduate Funding Limit

Enter a '2' in Item 28 if the student first enrolled in an institution of higher education in Fall 2006 and later. The edit run will produce 3 more reports that will list the students who are Approaching, Will Exceed, and Exceed the 30 SCH Limit. This is effective Summer 2008.

CBM002 – New edit check inserted to validate data reported

SCH in Developmental Ed/ College-level Course Grade – A student reported with Developmental SCH this semester is reported as passing that course in a previous semester.

A questionable message will be generated if Number of SCH in Developmental Ed field (Items 12, 13, 14) is greater than zero and the corresponding College-level Course Grade field (Items 25B, 35B, 45B) is coded as Null (0).

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Initial Assessment Pass-Fail/Course Grade – A student is reported as Not Attempted or Failed in the TSI Initial Assessment field and is also reported as Passing the course in a previous semester.

A questionable message will be generated if the Initial Assessment Pass-Fail field (Items 23B, 33B, 43B) equals 2, 3, or 4 and the Course Grade field (Items 25B, 35B, 45B) equals zero.

Modifications to CBM Report editing beginning Fall 2008

CBM001 all institutions – Add a field (Item 37) that will contain the College Board (CEEB) High School Code of the high school that the student graduated from. This will be mandatory for any Texas high school graduate that is enrolled at your institution and coded as First-time in college. The Appendix is being updated to include Appendix M, the College Board (CEEB) High School Codes for Texas. Not required for students accepted in a master's, doctoral, or first-professional program for the first time. Leave blank if not applicable. May be reported for all students. The high school codes for non-Texas schools can be found at <http://www.collegeboard.com/student/testing/sat/codelist.html>

CBM00R – Need to expand the license field and capture out of state licenses.

The current license field (Item 11) will become unused. A new license number field (Item 22) of 12 characters will be added and a 2-character field (Item 23) to identify the state that issued the license will be added. The two-letter US Postal Service state abbreviations will be used.



Texas Higher Education
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MEMORANDUM

January 18, 2008

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To: Health-Related Institution Reporting Officials
From: Doug Parker
Subject: Changes to Fall 2007 Reporting Manual

The following changes have been incorporated into the *Reporting and Procedures Manual for Health-Related Institutions*. The manual can be found at <http://www.txhighereddata.org/ReportingManuals.cfm> on our website.

I have joined the Educational Data Center as Director. My contact information has been incorporated into the manual on the Foreword and Contacts pages.

CBM001

1. The note under Item #13, Ethnic Origin, has been modified to further clarify the ethnicity reporting of foreign and out-of-state students allowed to pay the resident tuition rate due to a waiver. Note a) now reads: Even though a foreign student is allowed to pay the "Resident Tuition" rate due to a waiver (coded 'E' in Item #7), report with the international code. If an out-of-state student is allowed to pay the "Resident Tuition" rate due to a waiver (coded 'E' in Item #7), report the ethnicity of the student.
2. The edit program has been modified for Item #8, Residence, to flag records as questionable if the residence code is not Texas resident if Item #21, Tuition Exemption/Waiver Code, is coded '01'.
3. The names of the lists of doctoral students approaching/exceeding the doctoral SCH limit and UG students approaching/who will exceed/exceeding the 45-hour funding limit that appear on the CBM001 edits are listed on p. 1.17.

CBM00R

1. A reporting example has been added on page R.10 for reporting postdoctoral/research fellows in a program with no established program length.
2. The edit program is now in place for Item #15 to flag records with years in current program + 1 greater than the program length as an error.



Texas Higher Education
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MEMORANDUM

December 12, 2007

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To: Health-Related Institution Reporting Officials
From: Doug Parker
Subject: Changes to Reporting Manual for CBM00R for Fall 2007 Reporting

The following changes to the CBM00R have been incorporated into the *Reporting and Procedures Manual for Health-Related Institutions* effective with Fall 2007 reporting. The manual can be found at <http://www.txhighereddata.org/ReportingManuals.cfm> on our website.

Item #15: The name and definition has been changed to Years Completed in Current Residency/Research Program. Enter the cumulative number of years completed for the current program at the current institution. If the current year is the first year in the currently reported program (regardless of program level) at your institution for this resident (Item #13), enter 0. (An option of 0 for No Years has been added and an option of 7 for Seven Years has been deleted.)

Item #16: A phrase has been added for clarification to read – Enter the code that corresponds with the cumulative number of residency years at any institution, including the current institution, in all programs that the resident/fellow had completed **prior** to admission to the current resident/research program.

An edit condition has been added to Item #14 (Residency/Research Program Length). If Item #4, Reporting Category, is not = '00' (medical resident) the sum of Item #15 plus 1 cannot be greater than the program length reported in Item #14.

The sum of Item #15 and #16 cannot exceed 6. The Coordinating Board will add one year to the total for the current year. The record will be flagged as an error if the sum of Items 15 and 16 + 1 is greater than 7.

Reporting examples for Item #15 and #16 have been incorporated into the manual on page R.9.



Texas Higher Education
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MEMORANDUM

October 24, 2007

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To: Health-Related Institution Reporting Officials
From: Susan Brown
Subject: Additions to the CBM00R for Fall 2007

The following additions have been made to the CBM00R, Residents/Fellows Report.

1. The BDS degree (Bachelor of Dental Science) has been incorporated into Items #10 (Degree), #11 (Texas License/Permit Number), and #12 (Type of License).
2. An option of NL has been incorporated into Item #12 (Type of License) to indicate 'No License' for the DVM degree.

The field requirements on page R.9 have been adjusted to reflect the BDS and DVM degrees.



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M E M O R A N D U M

October 3, 2007

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To: Health-Related Institution Reporting Officials
From: Susan Brown
Subject: Changes to Fall 2007 Reporting Manual

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This memo outlines the modifications being made to the electronic CBM Reporting Manual on the CB website.

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CBM001

1. The last sentence in the first paragraph in the introductory section on page 1.1 has been changed to read ".....This includes receipt of a first installment payment prior to the beginning of the semester." This new language no longer requires one-half the tuition and fees be paid prior to the start of the semester; the colleges can establish their own payment plan with payment requirements.
2. An additional edit check has been incorporated to flag Item #8, Residence, an error if coded anything other than a Texas resident if Item #21, Tuition Exemption/Waiver, is coded with a Hazlewood exemption.

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CBM00R

3. The DMD, DDSPHD, and DVM degrees have been incorporated into Items #10 (Degree) and #12 (Type of License).
4. For fall 2007 reporting, if the resident/fellow has an out-of-state license or permit, enter in Item #11 (Texas License/Permit Number).
5. Options of NL and OOS have been incorporated into Item #12 (Type of License) to indicate 'No License' and 'Out of State,' respectively, for DDS, DMD, or DDSPHD degrees.
6. An option of NL has been incorporated into Item #12 (Type of License) for 'No License' for PHARMD degrees (temporarily due to testing delays).
7. A code of '0' has been added to Item #16 (Prior Cumulative Residency/ Research Years) for 'No Prior Years.'



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M E M O R A N D U M

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To: Public Health-Related Reporting Officials
From: Susan Brown
Subject: Changes to CBM00R (Residents/Fellows Report) Effective Fall 2007

This memo is to notify you of the following changes that have been made to the CBM00R, Residents/Fellows Report. The changes are effective for the upcoming report due October 1, 2007.

1. The MDPHD degree has been incorporated into Items 10 (Degree) and 12 (Type of License).
2. The instructions have been modified for Item #11, Texas License/Permit Number, to insure the permit number will be five digits. The new instructions are:

Enter the state-issued license/permit number or an institutional permit number, left-justified. If entering a permit number, do not include the alpha characters or leading zeros of the numerical value. Not required for DRPH or PHD degrees.

Leave blank if not applicable.

You can find the Reporting and Procedures Manual for the health-related institutions on our website at <http://www.txhighereddata.org/ReportingManuals.cfm>. As a reminder, the certification date for this report is October 15.



Texas Higher Education
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M E M O R A N D U M

May 14, 2007

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To: Public Health-Related Reporting Officials
From: Susan Brown
Subject: Changes to Fall 2005 Reporting Manual to become Fall 2007 Manual

This memo outlines the changes that have been made to the electronic CBM Reporting Manual on the CB website. Effective with reporting in Fall 2007, the due date of the CBM001 report will be October 15. Rather than reporting every other year in mid October, the due date will be the same every year. The due date of the CBM008 will be October 15 and the due date for the CBM009 will be October 1. This will align the submission of these reports with those of the general academic institutions. Also, this is a reminder that in order to post the accountability measures in a timely manner, the Fall reports will need to be certified by December 1.

In the **Introductory Section, page 0.5**, a new section has been added at the bottom of the page. It provides the submission time cutoff and weekday edit run times and expected times for the edit run reports to be posted to the institution output server area:

EDC Data Report Processing Schedule

Reports in by	Edit run begins	Edit reports posted
6:00 a.m.	6:20 a.m. (M-F)	7:00 a.m.
8:00 a.m.	8:20 a.m. (M-F)	9:00 a.m.
10:00 a.m.	10:20 a.m. (M-F)	11:00 a.m.
1:00 p.m.	1:20 p.m. (M-F)	2:00 p.m.
3:00 p.m.	3:20 p.m. (M-F)	4:00 p.m.
6:00 p.m.	6:20 p.m. (M-Th)	7:00 p.m.

CBM001 changes for 2007 reporting:

In the Remote Teaching Sites section add two entities to The University of Texas M.D. Anderson Cancer Center—000896 Bastrop Department of Veterinary Sciences and 000898 Science Park Operations at Smithville. Add one entity to The University of Texas Medical Branch at Galveston—000870 Austin.

CBM011 and CBM014, building and room reports have been added to the manual.

CBM00N The first sentence of the last paragraph in the Introduction section on page N.1 has changed to say “The CBM00N database is operational.”

CBM00R This is a new annual report due October 1 each year, to be certified by October 15. It is a report to identify residents (physicians, dentists, and pharmacists), clinical fellows, and postdoctoral research fellows. Appendix K of the Appendices will be created for this report as soon as we obtain the programs.



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MEMORANDUM

April 26, 2006

To: All Public Institutional Reporting Officials
From: Kenneth Dalley
Subject: Hurricanes Katrina and Rita Students

In my memo dated April 19, 2006 Re: Changes to Fall 2005 Reporting Manual Effective Fall 2006 I included the statement "The Katrina status of 'N' will not be in effect after the Spring 2006 term."

I should have said – As long as the Governor extends his Executive Order that "certifies that Hurricanes Katrina and Rita continue to create an emergency disaster and emergency conditions for the people in the State of Texas" the 'N' tuition status will be active .



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M E M O R A N D U M

April 19, 2006

To: Public Health-Related Institutional Reporting Officials
From: Kenneth Dalley
Subject: Changes to Fall 2005 Reporting Manual Effective Fall 2006

This memo outlines the changes that have been made to the electronic CBM Reporting Manual on the CB website. Also, this is a reminder that in order to post the accountability measures in a timely manner, the Fall reports will need to be certified by December 1.

Torca Bunton is now your CBM Data Analyst. She is also helping with passwords and data transfer issues as has been identified on page 0.2 and 0.3. Her phone number is 512-427-6532.

The CBM001 has been updated to reflect a new set of residency requirements based on Senate Bill 1528. The wording of the Tuition Status, Item #7, has been changed to reflect these requirements. It is important to identify students, other than Hazlewood recipients, who have been granted a tuition waiver even though there is not a way for one to report a specific waiver code in Item #21. Item #8, Residence, has been tweaked to capture the changes in SB 1528. The Katrina status of 'N' will not be in effect after the Spring 2006 term. In Item #9, Transfer Student or First-Time-in-College, in the last paragraph we inadvertently indicated to enter '000000' if the student was not a first-time transfer or a first-time student. The wording now again reads, "...leave blank, unless the student ...". If you are reporting the zeros, we will accept them too. In Item #19, Major Area of Concentration, the wording has been changed to "must" provide an appropriate major rather than "should" provide an appropriate major.

The Salary Ranges on the Questionable and Error conditions on the CBM008, Faculty Report, have been increased so fewer records will be considered questionable.



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M E M O R A N D U M

January 20, 2006

To: All Texas Higher Education Reporting Officials
From: Kenneth Dalley
Subject: CBM Reporting of Hurricane Katrina and Rita Students

The Texas Governor issued Executive Order RP 54 on January 10, 2006 which indicates that Hurricanes Katrina and Rita continue to create an emergency disaster and emergency conditions for the people in the State of Texas. Therefore, if the displaced students and other coastal residents of the Gulf Coast States affected by Hurricanes Katrina or Rita are allowed to continue their studies in Texas and pay in-state tuition, report them as a visiting student again this Spring. If they are charged the out-of-state amount of tuition, report them as a regular student.

This memo was sent via email, too.



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M E M O R A N D U M

October 30, 2005

To: All Public Institutions Reporting Officials and Institutional Researchers
From: Kenneth Dalley
Subject: Changes Fall 2005 Manual rev Fall 2005.3

This memo outlines the changes that have been made to the electronic CBM Reporting Manual on the CB website. Also, this is a reminder that in order to post the accountability measures in a timely manner, the Fall reports will need to be certified by December 1.

The Board approved the Rules concerning Excessive Hours and Repeated courses (Chapter 13, Subchapter F) at its October meeting. All the old rules relating to Excessive Hours and Repeated courses have been removed from the manual. The link at the CB website for the new rules has been inserted in their place.

A phrase was added to the CBM00B in the university manual. The third sentence in the general discussion now reads: Report only the applications of degree-seeking students that are complete.

A phrase was added to the CBM008 in the community, technical, and state college manual. The last sentence in the Item #19, Salary, now reads: Do not include benefits or overloads in the salary amount.



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To: All Texas Higher Education Reporting Officials

From: Kenneth Dalley

Subject: Changes to Fall 2005 CBM Reporting Manual – Rev 4 publics,
Rev 1 Independents

The Certification Tracking process in all the CBM Reporting Manuals has been changed. The desire is to have the most current data available for formula committee work, accountability measures, and appropriation requests within four working weeks of the due date. Since there are six edit cycles each workday, turn-around time should be less of an issue. Your help in meeting the new timeline will be appreciated.



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To: All Public University and Health-Related Reporting Officials and Institutional Researchers
From: Kenneth Dalley
Subject: Changes Fall 2005 Manual rev Fall 2005.3 Reporting of Certificates

As you are aware (ref: April 19, 2005 Memo), we have requested that you report the number of certificates you awarded this past year. In order to provide some clarification, we would like to have you report upper-level bachelor certificates of greater than 20 semester credit hours (SCHs) and graduate-level certificates of greater than 15 SCHs. The CIP classification that you will provide must be the same as the baccalaureate or graduate level degree program on the program inventory to which they support, unless the certificate program is on the CB Program Inventory. The Degree Conferred, Item #7, will be identified with "CER". Do not include any certificates that are awarded to continuing education students.

Since this is the first time we have made a comprehensive effort to record certificates as success indicators from our universities and health-related institutions, your input is crucial toward establishing a baseline. Future certificate tabulations may expand the number of SCH differentiations (i.e., lower semester credit hours for reporting purposes), but initially we just need to have you report greater than 20 SCHs for undergraduates and greater than 15 SCHs for graduates for certificate awardees. We will also be determining whether certificates need to be added to institutions' program inventories and how to collect data on certificates issued by other state agencies (e.g., TEA/SBEC). At this time do not report students who have taken courses toward their teacher certification since you do not award the certificate. Questions can be directed to Kenneth Dalley or Roger Alford. Thanks for your help.

Another area of concern is how to report students on the CBM001 who have been displaced by Hurricane Katrina and who qualify for a Hazlewood or other exemption/waiver. The expected coding of the Katrina students on the CBM001 is to preserve the tuition status of 'N' even though there may be a legitimate tuition exemption or waiver allowed. If a Hazlewood exemption is granted, the code of 01 will need to be reported in the appropriate exemption item (#20 for universities, #21 for HRIs) in order for the CB to capture the Hazlewood credit hours.

cc: Chief Academic Officer



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September 2, 2005

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M E M O R A N D U M

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To: All Texas Public Higher Education Reporting Officials
From: Kenneth Dalley
Subject: Changes to Fall 2005 CBM Reporting Manual due to Hurricane Katrina – Rev 3**

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The Texas Commissioner of Higher Education has agreed to allow displaced students and other coastal residents of the Gulf Coast States affected by Hurricane Katrina to continue their studies in Texas by enrolling as a visiting student at a Texas public college or university. The amount of tuition that is to be collected is an institutional decision. Also it is an institution's decision on the appropriate cut-off date after which the displaced students will not be allowed to register and begin active classes. Flex-entry classes (those that begin after the census date) are currently allowed.

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The student report (CBM001) has been modified to identify the displaced students.

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A new code "N" has been activated in the Tuition Status item on CBM001 report to indicate a visiting student who has been allowed to enroll due to this Natural Disaster. The Flex-Entry item has also been modified to accept a new code "7" as a secondary way to identify these students.

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Since the displaced students due to Katrina will not be required to be tested, they will not be reported on the TSI (CBM002) report.

cc: Presidents and Chancellors

****September 9, 2005**

In order to not compromise the standard coding of flex-entry students, a modification to the reporting requirements published in my 9/2/2005 memo on visiting (displaced) students has been made as follows:

Enter a '7' to identify a visiting (displaced) student who has been allowed to enroll in a regular (non-flex) class due to the natural disaster (Hurricane Katrina); otherwise, continue to code the flex-entry item with a '1' for a visiting (displaced) student who enrolls in a flex-entry class.



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MEMORANDUM

August 22, 2005

To: All Public Institutions Reporting Officials and Institutional Researchers
From: Kenneth Dalley
Subject: Changes Fall 2005 Manual rev Fall 2005.2a

This memo outlines the changes that have been made to the electronic CBM Reporting Manual on the CB website. Also, this is a reminder that in order to post the accountability measures in a timely manner, the Fall reports will need to be certified by December 1.

In the July 25 Memo, the wording in the respective Hazlewood Item of the CBM001 report in each of the public institution reporting manuals was reworded to reflect the split of the resident tuition exemptions and waivers; however, we failed to make the Error conditions on the Questionable and Error page comparable. The Error conditions now reflect the changes:

For the universities it is Item #20 and for the health-related institutions it is Item #21. The wording has been changed as follows: Any value except '01' when Item #7 is coded '3' or '21' when Item #7 is coded 'E'.

For community, technical, and state colleges the Item is #13A. The current wording is: Any value except '01' when Item #7 is coded '5' or '21' when Item #7 is coded 'E'.

The proposed CB Rules concerning Excessive Hours and Repeated courses (Chapter 13, Subchapter F) will be posted to the Texas Register soon.



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M E M O R A N D U M

July 25, 2005

To: All Public Institutions Reporting Officials and Institutional Researchers
From: Kenneth Dalley
Subject: Changes Fall 2005 Manual rev Fall 2005.2

This memo outlines the changes that have been made to the electronic CBM Reporting Manual on the CB website. Also, this is a reminder that in order to post the accountability measures in a timely manner, the Fall reports will need to be certified by December 1.

The wording in the respective Item of the CBM001 report in each of the public institution reporting manual has been reworded to reflect the split of the resident tuition exemptions and waivers.

For the university it is Item #20 and for the health-related institutions it is Item #21. The wording has been changed as follows: When Item #7 is coded '3' and the student is a resident receiving a Hazlewood exemption (authorized in TEC 54.203), enter the code "01". Otherwise leave it blank. When Item #7 is coded "E" and the student is a nonresident eligible to pay the resident rate due to the state's waiver for members of the military and their families (TEC 54.058), enter "21". Otherwise leave it blank.

For community, technical, and state colleges the Item is #13A. When Item #7 is coded '5' and the student is a resident receiving a Hazlewood exemption (authorized in TEC 54.203), enter the code "01". Otherwise leave it blank. When Item #7 is coded "E" and the student is a nonresident eligible to pay the resident rate due to the state's waiver for members of the military and their families (TEC 54.058), enter "21". Otherwise leave it blank.

The CTC faculty report has had a couple of changes too. The salary range for questionable has been changed from \$39,500 to \$78,000 if the Faculty Category is a 1. The error condition for the salary range has been qualified to be when the Faculty Category is a 1. The following sentence has replaced the first sentence in the Note after item #19 about the salary calculation: When computing average 9-month salaries, only the regular faculty identified in the Faculty Category (Item #17) whose "Percent of Time Directly Related to Teaching" (Item #16) is 100% will be used.



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M E M O R A N D U M

April 20, 2005

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To: Public Health-Related Institutional Reporting Officials
From: Kenneth Dalley
Subject: Changes to Spring 2004 Reporting Manual to become Fall 2005 Manual

This memo outlines the changes that have been made to the electronic CBM Reporting Manual on the CB website. Also, this is a reminder that in order to post the accountability measures in a timely manner, the Fall reports will need to be certified by December 1.

CBM001 changes for Fall 2005 reporting:

1. In the Introduction section the third paragraph is new. The discussion is how to report the classification of students who are participating in joint degree programs (e.g., MD/PhD).
2. In Item #5 a student in the special professional program of Audiology will be coded an '8'.
3. In Item #7 a new category 'E' has been added to identify a tuition waiver that allows a non-resident or foreign student to pay the resident rate. A value of 3 is now limited to Exemption for Texas residents.
4. In Item #8 definitions have been added to the three residence categories to specify that the desired code should reflect a student's permanent address at the time of application.
5. In Item #9 a third paragraph has been added: In the term that the student is accepted into a master's program, doctoral program, or first professional program (PharmD or AUD) enter '000001' in this item; otherwise, for a graduate or first-professional student enter '000000' unless the student is a first-time transfer at that level. If the student is a first-time transfer, enter the FICE of the institution transferring from. This will allow the CB to determine time-to-degree of such students.
6. The note in Item #13 was expanded to help identify when to report a student with an international code or the appropriate ethnicity.
7. Item #19 indicates that a valid CIP code is expected for a student's major program when reported at any level. Undeclared majors will not be accepted

CBM002 changes effective when the institution can implement them, but not later than Fall 2005 Report:

1. For the new SAT tests that include a writing component, ignore the writing section when evaluating an SAT exemption until the Coordinating Board approves the passing standard for writing.
2. A sentence has been added to the second paragraph in the introduction section "However, a transfer student determined to have satisfied TSI in a section upon admission to the Health Related Institution (HRI) may be reported with the HRI's parent FICE code and the default value of '99999' for the date of TSI satisfaction; all other items in that section will be filled with zeros.

3. In the "General Criteria About Initial Test Attempts" on page 2.5, a new second sentence has been added that allows an initial THEA test to be reported by section. Also sentences about the reporting of partial THEA test scores has been added to Items #23B,C,D/#33B,C,D/#43B,C,D.
4. On the Questionable and Error Values page, the allowable ranges for Item #14 have been increased to greater than 13 and 18, respectively. The error ranges of the Writing score under Item #23A/33A/43A and Item #24A/34A/44A have changed.
5. On the Questionable and Error Values page, the error values for Items #24C/34C/44C are more restrictive.
6. Changed examples 4 and 5 in the Example section to reflect the new coding of transfer students.

CBM008 to be changed for Fall 2005 Report:

1. In Item #11, Ethnic Origin, an unknown category, coded 7, has been added.
2. On the Questionable and Error Report for Item #19 (New Hire) the record will be considered in error if the percent time is not 100% for a faculty reported as a new hire.

CBM009 to be changed for Fiscal Year 2005 Report:

1. Add day to date of birth in Item #6.
2. In Item #8 (the level of the course dictates the certificate level)
 - a) add a level 6 to identify a baccalaureate-level certificate
 - b) add a level 8 to identify a graduate-level certificate
3. Add Item #14 Month of Award. Enter the two-digit number for the month in which the award was conferred (e.g., '05' for May).
4. Add Item #15 Last Name. Enter the student's last name. Truncate if the name contains over 20 characters.
5. Add Item #16 First Name. Enter the student's first name. Truncate if the name contains over 10 characters.
6. Add Item #17 Middle Name Initial. Enter the initial of the student's middle name.



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MEMORANDUM

September 16, 2004

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To: All Public Reporting Officials and Institutional Researchers
From: Kenneth Dalley
Subject: Changes to Spring 2004 Reporting Manual – Rev 7

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This memo rescinds our instructions for reporting the students who qualify under Section 2 of HB 1403 that I sent out in the memo of August 16, 2004. The change will be made to the electronic CBM Reporting Manual on the CB website in the next couple of days. I have been advised that the intent of the legislation is that "these students should not be classified as 'foreign' students or 'international' students." Thus, they should be reported as Texas residents and the residence code item should be the county in which they reside in Texas.

CBM001 change

University manual -- Item #12 Note b)
Health-Related manual – Item #13 Note b)
Community, Technical, State Colleges manual – Item #14 Note b)

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MEMORANDUM

August 16, 2004

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To: Public Health-Related Reporting Officials
From: Kenneth Dalley
Subject: Changes to Spring 2004 Reporting Manual – Rev 6
Fall CBM001 due October 20, 2004 for initial appropriations
Spring CBM001 due February 16, 2005 for final appropriations

This memo outlines the changes that have been made to the electronic CBM Reporting Manual on the CB website. The Foreword and the Electronic Data Transfer System on page 0.3 have been updated to reflect the use of SFTP.

CBM001 to be changed for Fall 2004 reporting:

1. In Item #13 Note b) Report international students who qualify under Section 2 of HB1403 (coded 'A' in Item #7) as international students even though they qualify for resident status for tuition and fee purposes (rather than by ethnicity).

CBM002 wording changes effective immediately:

1. The phrase "college readiness" has been replaced with "satisfaction" throughout the introduction section.
2. In the section under Exemptions, several changes have been made due to the new rules approved at the July 2004 Board meeting:
 - a. In the paragraph about Earned degrees the words "an accredited" have been replaced with "a Texas public".
 - b. The paragraph about ACT/SAT/TAAS/TAKS exemptions has been split into a paragraph for each test type.
 - c. In the paragraph about Transfers, "as determined by the receiving institution" has been added to the end of the sentence.
3. In the paragraph about Dual credit in the Waivers section, added score values for the high school exit standards along with the effective dates.
4. Added comments on General Criteria on Initial Test evaluation and TSI Satisfaction on page 2.5.
5. Added discussion on core course attempts of transfers in the General Education Core Curriculum on page 2.7.
6. In Items #20A/30A/40A in the second sentence inserted "Texas public" between previous and institution.
7. In Items #20B/30B/40B in the second sentence inserted "first time, or subsequently after a previous waiver expired" at the end of the sentence.
8. Qualified the definition of value 9 in Items #22B/#32B/#42B by adding "from Texas Public Institutions".
9. The last error condition in each of the following items have been added: Item #14 (questionable), #20A/30A/40A, #21/31/41, #22A/32A/42A, #33A, #23B/33B/43B, #23C/33C/43C, #34A.



Texas Higher Education COORDINATING BOARD

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MEMORANDUM

June 15, 2004

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To: All Institutional Reporting Officials
From: Kenneth Dalley
Subject: Changes to Spring 2004 Reporting Manual – Rev 5
TSI (CBM002) reporting clarifications
Extension of Due Date of Spring 2004 TSI (CBM002) Reports

Since there have been several weeks on the TSI reporting criteria in the last month, we have decided to extend the **due date** of the **Spring 2004 CBM002** reports from June 15th to **July 15th** for this year only. It only makes sense to clear up the Fall reports before submitting the Spring reports. The Spring extension is not to encourage you to stop working on the Fall reports.

Since the COMPASS, ASSET, MAPS, and ACCUPLACER test instruments are designed such that a student does not have to take the essay component at the same time that the objective component is taken (even though institutions are encouraged to do so), we have recoded our edit to allow a zero in Items 33A/34A when Item 33B/34B are reported with a value of 2, "Failed below the deviation". The essay component is the primary determinant for the value reported in Items 33A and 34A—above 5 is passing and below 5 is failing. The objective portion is only used to determine if a 5 is passing or failing. Therefore, if the objective component has been taken, but the essay portion has not, report zeros in Item 33A/34A, the date of the objective component in Item 33C/34C, and a 2 in Item 33B/34B. If neither the writing objective or the writing essay section have been attempted, report a 3, "Not Attempted", in Item 33B/34B and an 8, "Student allowed to enroll but did not test during the reporting period", in 33D/34D and zeros in the Items 33A/34A and 33C/34C.



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MEMORANDUM

June 7, 2004

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To: All Institutional Reporting Officials
From: Kenneth Dalley
Subject: Changes to Spring 2004 Reporting Manual – Rev 4
TSI (CBM002) reporting clarifications

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As the new TSI (CBM002) edit process matures a couple of changes have had to be made to the edit. One of those changes is in the recording of a "not taken" on an initial test occasion of the THEA/TASP test as a zero. The earlier edit restrictions did not allow a zero for a "not taken" and CB staff had instructed institutions to change the zero to a value of 100. Since the policy definition is that if a student attempts any part of a THEA/TASP on an initial test, all parts have been attempted. Code any area on an initial THEA/TASP as "Failed below the deviation" in Item 23B/33B/43B with a score value in Item 23A/33A/43A of zero and the same test occasion date in all Items 23C/33C/44C. A comparison on all initial assessment types has been implemented to evaluate the compliance of the THEA/TASP requirement (if one part taken, all have been taken). If there is a THEA/TASP type and another assessment type reported in the initial assessment items a comparison is done on the initial assessment dates to determine which assessment type occurs first. If THEA/TASP is the earliest initial test occasion, then all sections must be shown as THEA/TASP assessments and any area "not taken" on the initial assessment reported as failing below the deviation with a score of zero. Any other assessment type will have to be shown in the Subsequent Assessment categories (Items 24/34/44).

A second area of concern is in knowing when to report a core course of a transfer student. If an institution does not know whether a core course for a specific section has been taken by a transfer student they should code the Course Section as not attempted or with the appropriate code if it happened at their institution during the term being reported. In all terms after the passing grade is reported the area will be reported as null. If the institution evaluates a transfer core course and it is a C or better then they can code that area as null (already satisfied) rather than continuing to report the area as not attempted until the student attempts a core course at their institution. If the institution evaluates a transfer core course and it is less than C, then they should code that area as not attempted at this institution or with the appropriate code if it happened during the term being reported. **In no instance should the transferred-to institution report the grade from the transferring institution.**

If the TSI Satisfaction Date (Item 20B/30B/40B) is earlier than Fall 2003 (20031) then the obligation code (Item 21/31/41) cannot be a value of '6', '7', or '8' because those categories did not exist under TASP. Also if the TSI Satisfaction Date has been coded as occurring at a transfer institution (date coded 99999) or the satisfaction date is prior to the reporting term, the Exemption/Waiver Date (Items 22A/32A/42A) must be zeros.

Three new categories have been inserted in the Summary Report to reflect the number of students who have 1) zero sch and grade points, 2) sch greater than zero and zero grade points, or 3) zero sch, grade points, and developmental hours attempted. These are considered questionable but the printing of them were getting in the way of errors in the limited number of output lines that are made available to the institution (now 5000).



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MEMORANDUM

May 13, 2004

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To: All Chief Reporting Officials

From: Kenneth Dalley

Subject: Changes to Spring 2004 Reporting Manual – Rev 3
TSI (CBM002) reporting clarifications
Server file naming conventions

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As the TSI data (CBM002) are coming in and the error conditions are being evaluated, a couple of the error conditions need to be adjusted versus the way they are described in the reporting manual.

- The error conditions for Item #22B/32B/42B should read
Any value except '2' thru '9' or 'A' when item #20B/30B/40B = current date and item #21/31/41 = '3';
or any value except '0' when item #20A/30A/40A = FICE or item #20B/30B/40B = previous date;
or any value except '1' when item #20B/30B/40B = current date and item #21/31/41/ = '1', '4' thru '8';
or any value except '1' when item #20B/30B/40B = '00000' and item #21/31/41= '9'.
- A student must be enrolled at the institution during the term in which the "satisfaction" or "exemption/waiver" (date) is granted. The test occasion date alone does not determine the date.
- If a student is exempted/waived and has not taken an initial or subsequent test, the expected coding for both the initial test (Item #23B) and the subsequent test (Item #24B) is a '3' for not attempted, rather than the null value '0' which will be reported the next reporting period and thereafter. If a student is exempted/waived and has taken an initial or subsequent test, the expected coding for the initial test (Item #23B) or the subsequent test (Item #24B) is a '1', '2', or '4' for passed or failed, rather than the null value '0' which will be reported the next reporting period and thereafter.

- Determining the highest score on subsequent tests if multiple test instruments have been used:

If subsequent tests are not the same instrument, determine in which stratum (below deviation, above deviation but less than the passing standard, or above the passing standard) the score range falls for each instrument. Submit the test score that falls in the highest stratum. If the test scores are in the same stratum, it is an institution decision as to which one to report. Ideally, "concordance" tables for the various tests would enable the determination of the highest score. However, we are not aware of the existence of concordance tables between THEA/TASP, COMPASS, ASSET, MAPS, and ACCUPLACER. The score points (minimum, deviation, college-readiness, and maximum for each test/section are published in the Reporting and Procedures Manual (see pages 2.3, 2.4, 2.27, and 2.28; or pages 45, 46, 69, and 70 of the PDF document).

As we migrate to processing the CBM edits on a server over the next 3-4 months, a new naming convention has been implemented for the edit report output files. The following file name is an example...

CBM002_FALL_2003_S_003652_200405100136262.TXT

CBM002 – CBM report type

_ - used as a separator

FALL – the report semester (can also be SPRING, SUMMER, SUMMER1, SUMMER2, ANNUAL, QUARTER1, QUARTER2, QUARTER3, QUARTER4)

_ - used as a separator

2003 – Report Year

_ - used as a separator

S – Institution type (can also be J, H or I)

_ - used as a separator

003652 – FICE code of institution

_ - used as a separator

200405100136262 – Date Time stamp (Year, Month, Day, Hour, Minute, Second, Tenth of Second)

The CBM002 and CBM003 edit reports are edited on the server now and are stored with the new edit report names.



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MEMORANDUM

April 26, 2004

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To: Public Health-Related Institution Reporting Officials
and Institutional Researchers
From: Kenneth Dalley
Subject: Changes to Spring 2004 Reporting Manual – Rev 2

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This memo outlines the changes that have been made to the electronic CBM Reporting Manual on the CB website: <http://www.thehb.state.tx.us/DataAndStatistics/>.

The Coordinating Board approved the rules relating to the limitation of funding due to repeating of courses, Chapter 13, Subchapter B on Thursday, April 22, 2004. The shaded areas are insertions and the strike-through indicates words that have been deleted since the January version of the rules. These rules have been inserted on page 1.5 of the Reporting Manual. The certification deadline for the Spring CBM001 has been extended until June 1 to allow for modifying the reports to incorporate these changes.

13.25 Formula Funding Exceptions

(a) During each base year and non-base year, an institution or community college district shall not submit for formula funding any semester credit hours or contact hours attempted by a student who has enrolled in any course, other than a non-degree-credit developmental course, containing the same content for a third or more times at their institution since Fall Semester 2002. This provision is effective for the Spring 2004 semester for credit students and for Third Quarter 2004 for continuing education students.

(b) During each base year and non-base year, an institution shall not submit for formula funding any semester credit hours attempted by a student who has enrolled in development coursework, if the semester credit hours for that student in development coursework exceeds 18 semester credit hours, for a general academic teaching institution, or 27 semester credit hours for a public junior college, public technical institute, or public state college.

(c) English as a Second Language (ESL) hours may be used for developmental education purposes when a student is placed in such courses as a result of failing the reading or writing portion of a test required by the Texas Success Initiative. However, when used for such purposes, ESL hours shall be counted toward the 18/27 hour cap.

- (d) Semester credit hours or contact hours attempted by students for the following types of coursework are exempt from the provisions of this section:
- (1) thesis and dissertation courses.
 - (2) courses that may be repeated for credit because they involve different or more advanced content each time they are taken, including but not limited to, individual music lessons, Workforce Education Course Manual Special Topics courses (when the topic changes), theater practicum, music performance, ensembles, certain physical education and kinesiology courses, and studio art.
 - (3) independent study courses, ~~except when the independent study course has the same content as a course the student has already taken two or more times,~~
 - (4) special topics and seminar courses that may be repeated for credit with different content, ~~except when a special topics course has the same content as a course the student has already taken two or more times,~~
 - (5) Continuing education courses that must be repeated to retain professional certification.
 - (6) Developmental Education coursework taken for a third or more times may be submitted for formula funding if the coursework is within the 27-hour limit at two-year colleges and the 18-hour limit at general academic institutions specified in (b) of this Section.



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MEMORANDUM

February 2, 2004

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To: All Institutional Reporting Officials
From: Kenneth Dalley
Subject: Changes to Spring 2004 Reporting Manual – Rev 1

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This email is a reminder that the CBM002 report for Fall 2003, which normally is due February 1, is to be reported in the revised new format. Since the instructions were not released until January, the due date was extended until May 10th. Institutions that continued to use TASP policy to implement TSI for any part of the new academic year will be required to use the new format just like those who switched to TSI policy effective Fall 2003. The old TASP format of the CBM002 report is not acceptable for reporting Fall 2003 or subsequent CBM002 data.

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CBM002 – all institutions:

The following two sentences have been added at the end of the first paragraph in the Introduction section of the CBM002: Students may be exempt from the assessment and advisement requirements of the TSI; however, institutions are not exempt from the evaluation and reporting requirements of the TSI. The revised CBM002 will minimize the burden of reporting exempt students, but that data is needed for TSI evaluation and several other purposes (i.e., GPA for all undergraduates).

A concern has been raised about the effort to identify the FICE of students who previously satisfied TSI/TASP and transferred into the institution prior to Fall 2004. Historically, institutions have not been required to retain the FICE of the institution where the student previously satisfied the TSI/TASP requirement. All that was required was a way to indicate that TSI/TASP was complete. The following sentence has been added to the Item definition for Items 20A/30A/40A:

If the specific institution (FICE) has not been recorded in the institution's electronic data for students transferring prior to Fall 2004, the FICE of the latest public institution transferred from may be reported on the revised CBM002 in Items #20A (or 30A or 40A).

The error value on the Questionable and Error page (2.25) for Item #21/31/41 (TSI Obligation) should be stated:

Any value except '1' or '3' thru '8' when item #20B/30B/40B = current date; or **any value except '0'** when item #20A/30A/40A = FICE or item #20B/30B/40B = previous date; or **any value except '9'** when item #20B/30B/40B = '00000'

The error value on the Questionable and Error page (2.26) for Item #22B/32B/42B (TSI Exemption/Waiver Status) should be stated:

Any value except '1' thru '9' or 'A' when item #20B/30B/40B = current date and item #21/31/41 = '3'; or **any value except '0'** when item #20A/30A/40A = FICE or item #20B/30B/40B = previous date

Item #23A/33A/43A (TSI Initial Assessment Score, page 2.26) referred to the wrong Item # in the description of each test instrument. The test category should read:

When Item #23D = 1
When Item #23D = 2
etc.

Rather than referencing a previous item for the definitions of Item #24A/34A/44A on page 2.27, the specific categories have been listed to identify error values.

The following sentence has been added to the instructions on Items 23C/33C/43C and 24C/34C/44C: If the month and year are known but the specific day of the test is not known, enter a default day of the 15th.

A reporting semester has been added to each of the examples to add more clarity to the values provided in each item. We had defaulted to the Fall 2003 term, but if you use another term the values may not be appropriate.

CBM004 – Universities and Community, Technical, and State Colleges:

At the CB Board meeting on Thursday, the rules dealing with the repeating of the same course was discussed. The effective date to start counting courses of students who attempt the same course more than twice has changed to Fall 2002, rather than September 1, 2001. (Final rules to be adopted in April 2004. See proposed rules at <http://www.thecb.state.tx.us/CBRules/proposed.htm>, Chapter 13, Subchapter B, Section 13.25.)

CBM004 – Universities:

Item #13e on page 4.12 and 6.6 of the Universities' Reporting Manual the following sentence was replaced with the sentence below it:
A PharmD student who has completed the master's level course work and is enrolled in special-professional pharmacy courses (approximately the last 40 semester credit hours) is to be included.

For PharmD students see the discussion in the pharmacy funding section of the Introduction section of the CBM004.

CBM001 – Universities:

On page 1.4 of the Universities' Reporting Manual the following change has been made to reflect the definitional change of PharmD in September 2002:
SPECIAL PROFESSIONAL PHARMACY. A student admitted to an approved PharmD program at the institution. Prior to admission to pharmacy school a student must complete at least 60 semester credit hours (SCH) of pre-pharmacy coursework.

CBM001 – Health-Related Institutions:

At the CB Board meeting on Thursday, the rules dealing with the repeating of the same course was discussed. The effective date to start counting courses of students who attempt the same course more than twice has changed to Fall 2002, rather than September 1, 2001. (Final rules to be adopted in April 2004. See proposed rules at <http://www.thecb.state.tx.us/CBRules/proposed.htm>, Chapter 13, Subchapter B, Section 13.25.)



Texas Higher Education COORDINATING BOARD

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MEMORANDUM

December 5, 2003

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To: Public Health-Related Institution Reporting Officials
and Institutional Researchers

From: Kenneth Dalley

Subject: Spring 2004 Reporting Manual & Appendices

This memo outlines the changes that have been made to the electronic CBM Reporting Manual on the CB website: <http://www.thecb.state.tx.us/DataAndStatistics/>.

The historical Memos have been removed from the reporting manual and put into a separate report called "Memos Related to Changes to the CBM Manual for Health-Related Institutions." A link to the Memos is provided on our Data and Statistics Portal under Reporting, which is the same area that the manuals are referenced. The current Memo will continue to be posted after the cover page in the manual.

The format of email addresses has changed at the Coordinating Board to firstname.lastname@thecb.state.tx.us and all references have been modified in the manual.

On page 0.3 in the Electronic Data Transfer System a link has been provided to a report that gives detailed instructions on using FTP to transmit and retrieve files. Effective January 5, 2004 the CB will support transferring of the reports in an encrypted format using SFTP. The instructions for using SFTP will be incorporated in a similar report at the same link. All institutions will be required to submit all their report in an encrypted form by June 1, 2004.

Rather than printing a CB rule, the chapter and paragraph are identified and a link is provided to the Rule.

All references to allowing updates have been removed. To make a change, apply the correction to the specific item and resubmit the complete file again.

CBM001 -- Item #22, SCH Load – Not State Funded, has been expanded to include the credit hours attempted if a student has attempted the same course more than twice and thus the hours are not eligible for state funding. Current guidelines on the limitation of state funding of courses that have been repeated more than twice are on page 1.5. Discussion about Doctoral hour limitations has been included on page 1.6.

CBM002 – The old TASP criteria is still there until the Success Initiative requirements are finalized in the next couple of weeks.

Memorandum
December 5, 2003
Page 2

The Appendices to the Reporting and Procedures Manuals for Texas Universities, Health-Related Institutions, and Community, Technical, and State Colleges has been updated to September 2003. Changes were made to the following sections of the Appendices:

Appendix A: FICE codes were added or changed and name changes were incorporated

- 003632 from 010366 Texas A&M University
- 036273 from 358135 Lamar Institute of Technology
- 031034 from 109225 South Texas Community College
- 003545 from 006932 Baylor University

Appendix C: the 2000 CIP codes have replaced the 1990 CIP codes

Appendix D: the administrative unit codes have been updated

Appendices E, F, and G: deleted

Appendix H: is now Appendix E which shows the funding codes associated with the 2000 CIPs



TEXAS HIGHER EDUCATION COORDINATING BOARD

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MEMORANDUM

October 16, 2003

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Kevin P. Eltife
Jerry Farrington
Cathy Obriotti Green
Gerry Griffin
Carey Hobbs
Adair Margo
Lorraine Perryman
Curtis Ransom
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TO: Presidents and Chancellors, Texas Public Universities, Community and Technical Colleges, and Health-Related Institutions

FROM: Don W. Brown

SUBJECT: General Appropriations Act, Special Provisions Section 50

Don W. Brown
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The 78th Texas Legislature enacted House Bill 1, the General Appropriations Act. Within the Act, Section 50 of Special Provisions Relating Only to State Agencies of Higher Education, *Limitations on Formula Funding Contact and Semester Credit Hours*, provides that "It is the intent of the Legislature to control costs and limit General Revenue formula appropriations by excluding contact hours or semester credit hours related to a course for which a student is generating formula funding for the third time from being counted in the hours reported by the Higher Education Coordinating Board to the Legislative Budget Board for formula funding."

As a result of this provision, the Coordinating Board is offering guidance to institutions of higher education about our implementation plans for compliance with its legislative intent. The Coordinating Board will consider proposed rules on Section 50 at its January 2004 meeting and will consider final action on the rules at its April 2004 meeting. However, in the interest of helping the institutions revise their own policies and procedures to accommodate any likely changes, I am providing as a guideline the following information. We will recommend to the Coordinating Board in January that it propose rules that incorporate the guideline stated below.

Guidelines on funding limitations for repeated courses:

- (a) Public institutions of higher education may not submit for formula funding credit or contact hours attempted by students who have enrolled in courses containing the same content for a third or more times at institutions since September 1, 2001.
- (b) Hours generated by credit students and continuing education students that generate contact hour funding are subject to the repeated course limitation during the base-year as well as the non-base-year.
- (c) Reporting changes required by this section are effective with the Spring 2004 semester for credit students and Quarter 3 2004 for continuing education students.

- (d) The following types of courses are exempt because they are designed to be repeated and do not count toward the limit:
- (1) thesis and dissertation courses.
 - (2) courses that may be repeated for credit because they involve different or more advanced content each time they are taken, including but not limited to, private music lessons, Workforce Education Course Manual Special Topics courses (when the topic changes), and studio art.
 - (3) independent study hours, except when the independent study course has the same content and it functions as a substitute for a course the student has already taken two or more times.
 - (4) special topics courses that can be repeated for credit with different content, except when a special topics course has the same content as a course the student has already taken two or more times.
 - (5) Within the 27-hour limit at 2-year colleges and the 18-hour limit at the general academic institutions, a student's enrollment in the same developmental education course more than twice may be reported if it is handled in the manner of individualized instruction in which the student is learning different content when the course is repeated.
 - (6) Continuing education courses that must be repeated to retain professional certification.
- (e) The institution may not allow the use of an independent study course or a special topics course to circumvent the funding limitation.

To minimize the amount of changes that may be made to the rules, if you would like to provide preliminary input to the Coordinating Board as we prepare the rules, please make your comments in writing to Dr. Deborah Greene, Assistant Commissioner for Finance, Campus Planning, and Research, at deborah.greene@theqb.state.tx.us. We will, of course, offer an official comment period after the rules have been proposed by the Board in January.

cc: Chief Financial Officers



Texas Higher Education COORDINATING BOARD

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August 23, 2002

MEMO

Susan E. Brown
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To: Health-Related Institution Reporting Officials and Institutional Researchers

From: Kenneth Dalley

John R. Cox
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Subject: Spring 2001 Reporting Manual revision 6
New Data Analyst and Reporting Due date for the CBM001 for Appropriation
Process

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As of August 23, 2002, the following CBM changes have been included in the web manual to be effective Fall 2002:

The requirement to report the SCH Release, Item #37, has been rescinded and the item labeled "unused". That Item has been removed from all of the reports associated with the CBM001. However, the requirement to report a student's request of Non-Disclosure is still required on the CBM001, CBM002, and CBM009. (The Don Brown memo of July 24, 2002, has been posted behind this memo on the web.)

Effective September 1, 2002, Charles Busbey's responsibilities are changing to process community college reporting only. Ms. Jocelyn Groce has been hired to handle the health-related reports that Charles was managing. Her phone number will be 512-427-6415. Jocelyn has worked the last five years in our Student Services Division.

In order to meet the Legislative Budget Board timeline for generating formula runs, the Fall 2002 credit class, CBM004, and student, CBM001, reports will be due October 16th and the Spring 2003 credit class, CBM004, and student, CBM001) reports will be due February 19th.



TEXAS HIGHER EDUCATION COORDINATING BOARD

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MEMORANDUM

July 24, 2002

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TO: Presidents and Chancellors
Public Institutions of Higher Education

FROM: Don W. Brown

SUBJECT: Another Change to February 22, 2002 Memorandum Regarding
Re-disclosure of Student Enrollment Data and Changes to Institutional
Reporting Requirements

Don W. Brown
COMMISSIONER
OF HIGHER EDUCATION

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Since my February 22, 2002, memorandum, we've continued to look at questions regarding the Family Educational Rights and Privacy Act (FERPA) and the re-disclosure of personally identifiable student data that has been sent to us by higher education institutions.

Specifically, there have been many additional conversations among attorneys, the U.S. Department of Education, institutional researchers, registrars, admissions officers, and our staff regarding our request that the institutions obtain the consent of all students to disclose the number of semester credit hours (SCH) taken by a student. I sincerely appreciate the assistance that everyone has provided to us in making these changes in data reporting requirements, particularly the assistance of TACRAO in meeting with us to address some of the concerns of the registrars and admissions officers.

As a result of these conversations, we have concluded that the benefits of obtaining consent from *all* students for the re-disclosure of SCH are outweighed by the added administrative burden on institutions as a result of this requirement and the potential confusion to students. We are, therefore, changing our policy and asking that the institutions obtain the student's consent to re-disclose SCH *only* from those undergraduate students who are approaching the maximum number of SCH that can be funded by the formula, and for those students who apply for the \$1000 tuition rebate for completing their degree plans within three SCH of the hours required by each student's plan.

Without the consent of all students, we will not be able to include SCH data in migration reports requested by the institutions but we will be able to include in the reports all data designated as "directory information."

Beginning with the fall 2002 semester reporting period, therefore, institutions will be required to:

- Provide annually to the Coordinating Board a copy of the notice to students that defines "directory information";
- Identify, at a minimum, the following items as "directory information:" name; field of study; enrollment status (full-time, part-time undergraduate, graduate, etc.); degrees, certificates, and other awards received; the type of award received (academic, technical, Tech-Prep, or continuing education); dates of attendance; student classification; and name of the most recent previous institution attended; and

Memorandum
July 24, 2002
Page 2

- “Flag” individual student electronic data (submitted to the Coordinating Board) to indicate those students who have notified the institution of their refusal to have “directory information” disclosed.

Thank you for your patience and assistance in this matter. Please call me if you have questions about any of the new data reporting requirements. David Gardner, Assistant Commissioner for Planning and Information Resources, at (512) 427-6126, and Jan Greenberg, General Counsel, at (512) 427-6143, can also answer questions about these issues.

cc: General Counsels
Admissions Officers and Registrars



Texas Higher Education COORDINATING BOARD

DIVISION OF PLANNING AND INFORMATION RESOURCES
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May 1, 2002

MEMO

Susan E. Brown
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To: Health-Related Institution Reporting Officials and Institutional
Researchers

From: Kenneth Dalley

John R. Cox
Director
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Subject: Spring 2001 Reporting Manual revision 5
Student report changes for "Non-Disclosure" of directory information

Casey M. Kennedy
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As of May 1, 2002, the following CBM changes have been included in the web manual to be effective Fall 2002:

The change is to the default value of the new Items added in the April 26th memo about Non-Disclosure and SCH Release. To help assure that the item has not been overlooked, a value of '0' will be expected instead of a blank. In each of the records for the Non-Disclosure and SCH Release, the appropriate values should be '2' or '0' (for Non-Disclosure) and '1' or '0' (for SCH Release) on the CBM001, CBM002, and CBM009. The page numbers are identified on the prior memo.

Dale Hartman retired as of April 25th after over ten years with the Coordinating Board. We will miss his support. Scott Sewell is his replacement assuming the electronic transfer responsibilities.



Texas Higher Education COORDINATING BOARD

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April 26, 2002

MEMO

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To: Health-Related Institution Reporting Officials and Institutional Researchers

From: Kenneth Dalley

Subject: Spring 2001 Reporting Manual revision 4
Student report changes for "Non-Disclosure" of directory information

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As of April 26, 2002, the following CBM changes have been included in the web manual to be effective Fall 2002:

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The following changes are to capture a "Non-Disclosure" of directory information flag on the student report (CBM001), the TASP report (CBM002), and the degree report (CBM009). The CBM001 also has a new item to acknowledge a student's consent for the CB to provide his/her current institution with semester credit hour data taken at other institutions. These changes are effective with the submission of the Fall 2002 reports.

Item #36, Non-Disclosure, and Item #37, SCH Release, are the new items added to the CBM001 on page 1.11. The Data Processing Record Layout on page 1.13, the questionable/error values on page 1.16, the Edit Summary report on page 1.19, and the Summary of Student data on page 1.21 now reflect the new items. The item number of the update code has changed to #39. The parenthetical phrase (citizen) in Item #8, Residence, on page 1.7 has been deleted. The second sentence in Item #11 on page 1.8 has been replaced with the following sentence: Include these credit hours in Item #10 and in Items #16, #22, #24, or #25 as appropriate.

Item #50, Non-Disclosure, has been added to the TASP report (CBM002) on page 2.16. The Data Processing Record Layout on page 2.18, the questionable/error values on page 2.20, and the Edit Summary on page 2.24 reflect the new items, too.

Item #13, Non-Disclosure, has been added to the CBM009 on page 9.3. The Data Processing Record Layout on page 9.4, the questionable/error values on page 9.5, the Edit Summary report on page 9.8, and the Summary of Degrees on page 9.9 now reflect the new item. The update code is now Item #15.



Texas Higher Education COORDINATING BOARD

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September 27, 2001

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MEMO

To: Health-Related Reporting Officials and Institutional Researchers
From: Kenneth Dalley
Subject: Spring 2001 Reporting Manual revision 3 (TASP changes)

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As of September 27, 2001, the following CBM002 changes have been included in the web manual to be effective Fall 2001:

The TASP report (CBM002) has been updated to include a new code '8' in Item #18, TASP Exemptions/Waivers on page 2.8, to identify the new exemption for high school graduates who attained a 3.5 grade point average or above in a Recommended or Advanced Curriculum. The "Active-Duty Military" waiver will be coded in category '6' which has been modified to indicate an "exemption/waiver based on other criteria". The discussion in the introduction section of the TASP report, pages 2.2 through 2.4, has been rearranged so that "exemptions" and "waivers" and "criteria for meeting TASP requirements" have been listed separately in each respective area. Also the "Questionable and Error Values" for Item #18 on page 2.19 has been updated to allow for the new value of '8'. These changes are effective with the submission of the Fall 2001 CBM002 report by February 1, 2002.



Texas Higher Education COORDINATING BOARD

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September 18, 2001

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MEMO

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To: Health-Related Reporting Officials and Institutional Researchers
From: Kenneth Dalley
Subject: Spring 2001 Reporting Manual revision 2 (clarifications)

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As of September 18, 2001, the following CBM001 changes have been included in the web manual to be effective Fall 2001:

After much discussion, it has been determined that the students who meet the qualifications to pay resident tuition based on HB 1403 Section 2 and Section 4 need to be identified separately. Therefore, Item #7, Tuition Status, on page 1.7 and Item #13, Ethnic Origin, on page 1.8 of the student report (CBM001) have been changed. In Item #7, the code 'A' has been limited to students identified in Section 2 of HB 1403. A new code 'C' has been added to identify the students who qualify under Section 4 of HB 1403 or CB policy. Also, the note associated with Item #13, Ethnic Origin, has been expanded to clarify how these international students should be coded.

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NOTE for Item #7:

- a) International students who are allowed to pay the "Resident Tuition" rate due to an exemption or waiver should be coded '3'.
- b) International students who qualify under Section 2 of HB 1403 should be coded 'A'. These are students who have, among other qualifications, lived in Texas three consecutive years prior to graduation from a Texas high school or a GED completion.
- c) International students who qualify under Section 4 of HB 1403 or CB policy as outlined in memos issued by Commissioner Brown who are allowed to pay resident rates should be coded 'C'. These students who have applied to or have a petition pending with the Immigration and Naturalization Service to attain lawful status under federal immigration law qualify for resident status for tuition and fee purposes. Included are international students who obtain residency through the eligibility specified in the CB policy memo interpreting TEC 54.057 and the Attorney General opinions.

NOTE for Item #13:

International denotes a person who is not a citizen or permanent resident of the United States and who is in this country on a temporary basis and does not have the right to remain indefinitely.

- a) Even though an international student is allowed to pay the "Resident Tuition" rate due to an exemption or waiver (coded '3' in Item #7) report with the international code.
- b) Identify the appropriate ethnicity of international students who qualify as residents of Texas for purposes of higher education tuition under Section 2 of HB 1403 (coded 'A' in Item #7).
- c) Continue to report international students who have applied to or have a petition pending with the Immigration and Naturalization Service as international students even though they qualify for resident status for tuition and fee purposes under Section 4 of HB 1403 (coded 'C' in Item #7). Do the same for international students who qualify to pay resident rates through CB policy or Attorney General opinions.



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July 11, 2001

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MEMO

To: Health-Related Institutional Reporting Officials and
Institutional Researchers

From: Kenneth Dalley

Subject: Spring 2001 Reporting Manual revision 1 (clarifications)

As of July 11, 2001, the following changes have been included in the web manual to be effective Fall 2001:

1. In the student report (CBM001) a new code 'A' has been added to Item #7, Tuition Status, to identify foreign students who are eligible to pay resident tuition. The definition of code 'A' is "Foreign students classified as residents in HB 1304 or CB policy." In item #13, Ethnic Origin, add another sentence to the Note on International students to read "If the international student qualifies as a resident of Texas for purposes of higher education tuition, identify the appropriate ethnicity of the student."
2. In Item #17, Flexible Entry, on the CBM001 two codes have been added. A code of 2 to identify "professional students enrolled in academic course work as a 'dual degree' student" and a code of 4 to identify "academic students enrolled in inter-institutional courses at a health science center".
3. Beginning this fall the "SCH of an undergraduate degree program" (Item #27) on the CBM001 must be reported for all seniors.
4. A new Item #35, RN Nursing Program, has been added to identify eligible hours which apply toward enrollment growth in RN professional nursing programs. The item definition is "Enter an 'NL' (Not Licensed) to indicate that the student is enrolled in the "generic" BSN program, otherwise leave the item blank. Students who have received their RN license are not to be reported in this category. Report the student in this status as long as they are studying toward their first RN license."
5. Questionable faculty salary ranges have been increased on the CBM008 report.
6. A new report, the CBM00N, has been added to accept and store name and number changes of students who may be affected by the 45-plus undergraduate funding limit. The CBM00N can be submitted at any time.

CORRECTION: HB 1304 should read HB 1403