



Texas Higher Education
COORDINATING BOARD
Planning and Accountability

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

MEMORANDUM

July 8, 2011

Susan E. Brown
Assistant Commissioner
Planning and Accountability
512/ 427-6153
susan.brown@thehb.state.tx.us
FAX: 512/ 427-6147

Gary W. Johnstone
Deputy Assistant Commissioner
Planning and Accountability
512/ 427-6139
gary.johnstone@thehb.state.tx.us
FAX: 512/ 427-6147

Janet Beinke
Director
Planning
512/ 427-6321
janet.beinke@thehb.state.tx.us
FAX: 512/ 427-6147

Linda L. Hargrove, Ph.D.
Director
Research and Evaluation
512/427-6122
linda.hargrove@thehb.state.tx.us
Fax: 512/ 427-6147

Thomas E. Keaton
Director
Finance and Resource Planning
512/ 427-6133
thomas.keaton@thehb.state.tx.us
FAX: 512/ 427-6147

Doug Parker
Director
Educational Data Center
512/ 427-6287
doug.parker@thehb.state.tx.us
FAX: 512/ 427-6147

Kathy Cox
Assistant Director
Educational Data Analysis Support
Center
512/ 427-6286
kathy.cox@thehb.state.tx.us
FAX: 512/ 427-6147

To: Public University Chief Reporting Officials
From: Doug Parker
Subject: Summer 2011 Reporting Manual

The *Reporting and Procedures Manual for Texas Public Universities* has been revised effective Summer 2011. It has been placed on the Coordinating Board website at <http://www.txhighereddata.org/ReportingManuals.cfm>. The *Appendices to the Reporting and Procedures Manual* can be accessed at the same address. Below is a list of changes and modifications made to the manual. The Texas Plan (TXP) reporting due every other year has been discontinued.

This spring, Coordinating Board staff collaborated with volunteers from public higher education institutions in a review process of several CBM reports, including the CBM001, CBM0E1, CBM002, CBM004, CBM008, CBM009, CBM011, CBM014, CBM00C, CBM00A, CBM00R, and CBM00S. The work groups focused on improving the clarity of the CBM manuals and exploring options for improving edit reports. Editorial changes made to report introductions and items that do not affect item content are not included in the listed updates in this memo. Substantial additions and changes were made to the CBM0E1, CBM002, CBM00S, CBM004, CBM005, and CBM008. Institutions are encouraged to review the introductions and item descriptions for the reviewed reports to help ensure reporting accuracy.

CBM001

1. The following classification levels in Item #5 have been changed:
 - Doctoral Level changed to Doctor's Level-Research/Scholarship
 - Special-Professional changed to Doctor's Level-Professional Practice
2. Item #32, Restricted Program Admission, has been modified to reflect the new doctoral and special-professional designations. Changes are also made to the definitions.
 - 40 Special-Professional-Audiology (AUD) changed to Doctor's Level-Professional Practice – Audiology (AUD)
 - 41 Special-Professional-Veterinary Medicine (DVM) changed to Doctor's Level-Professional Practice – Veterinary Medicine (DVM)
 - 42 Special-Professional-Law (JD, LLB) changed to Doctor's Level-Professional Practice – Law (JD, LLB)
 - 43 Special-Professional-Optometry (OD) changed to Doctor's Level-Professional Practice – Optometry (OD)
 - 44 Special-Professional-Pharmacy (PharmD) changed to Doctor's Level-Professional Practice – Pharmacy (PharmD)
 - 45 Special-Professional-Doctor of Nursing Practice (DNP) changed to Doctor's Level-Research/Scholarship – Doctor of Nursing Practice (DNP)
 - 46 Special-Professional-Doctor of Physical Therapy (DPT) changed to Doctor's Level-Professional Practice – Doctor of Physical Therapy (DPT)

CBM003

1. The following course levels have been changed in Item #6:
 - Doctoral changed to Doctor's Level-Research/Scholarship
 - Special-Professional changed to Doctor's Level-Professional Practice

2. Items #16 and #17 have been added for Texas Common Course Numbering System (TCCNS) equivalents:

Item #16 Subject Prefix (beginning in position 84)

Item #17 Course Number (beginning in position 88)

CBM004

1. Item #5, Section Number, has increased to 7 positions, changing the record layout from Item #5 to Item #8B by two additional positions.
2. A new code for Clinical ('C') has been added to item #6, Type of Instruction.
3. A new code for High School for Dual Credit ('H') has been added to Item #8, Location Code.
4. Instruction for reporting 'H' in Item #8 has been added to Off-Campus Location (Item #10) – enter the zip code of the high school campus.
5. The enrollment levels in Item #13D and #13E have been changed:

Doctoral Level changed to Doctor's Level-Research/Scholarship

Special-Professional changed to Doctor's Level-Professional Practice

CBM005

1. Item #5, Section Number, has been modified from 5 spaces to 7; this will change the record layout beginning with Item #5 and ending with Item #19 by two additional positions.
2. The enrollment levels in Items #15D and #15E have been changed:

Doctoral Level changed to Doctor's Level-Research/Scholarship

Special-Professional changed to Doctor's Level-Professional Practice

CBM006

1. A new code ('C') for Clinical has been added to item #6, Type of Instruction.
2. A new code of 'H' (High School for Dual Credit) has been added to Item #8, Location Code.
3. Instruction for reporting 'H' in Item #8 has been added to Off-Campus Location (Item #10) – enter the zip code of the high school campus.
4. The enrollment levels in Item #13D and #13E have been changed:

Doctoral Level changed to Doctor's Level-Research/Scholarship

Special-Professional changed to Doctor's Level-Professional Practice

CBM009

The following degree levels in Item #8, Level of Degree Conferred have been changed:

Doctoral changed to Doctor's Degree-Research/Scholarship

Professional changed to Doctor's Degree-Professional Practice

CBM00B

Item #12, Application Level, Doctorate (code 08) has been changed to Doctor's Degree-Research/Scholarship

CBM00X

Item #5, Classification, Doctoral Level has been changed to Doctor's Degree-Research/Scholarship



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

MEMORANDUM

October 11, 2010

Susan E. Brown
Assistant Commissioner
Planning and Accountability
512/ 427-6153
susan.brown@thecb.state.tx.us
FAX: 512/ 427-6147

Gary W. Johnstone
Deputy Assistant Commissioner
Planning and Accountability
512/ 427-6139
gary.johnstone@thecb.state.tx.us
FAX: 512/ 427-6147

Janet Beinke
Director
Planning
512/ 427-6321
janet.beinke@thecb.state.tx.us
FAX: 512/ 427-6147

Linda L. Hargrove, Ph.D.
Director
Research and Evaluation
512/427-6122
linda.hargrove@thecb.state.tx.us
Fax: 512/ 427-6147

Thomas E. Keaton
Director
Finance and Resource Planning
512/ 427-6133
thomas.keaton@thecb.state.tx.us
FAX: 512/ 427-6147

Doug Parker
Director
Educational Data Center
512/ 427-6287
doug.parker@thecb.state.tx.us
FAX: 512/ 427-6147

Kathy Cox
Assistant Director
Educational Data Analysis Support
Center
512/ 427-6286
kathy.cox@thecb.state.tx.us
FAX: 512/ 427-6147

To: Public University Reporting Officials
From: Doug Parker
Subject: Reporting Manual Changes

In April 2009, TEA received a Statewide Longitudinal Data System (SLDS) grant from the U.S. Department of Education. The grant involves expanding the existing THECB data collections to include student data at the classroom level, as well as course completion data. This data will provide a basis for future analysis and reporting on aggregate student performance. The first data submission by higher education institutions will be for the Summer 2011 reporting cycle.

The report for this new data collection will be captured in the Student Schedule Report. Some of the existing reports have been modified based on implementation of this new data collection. The changes to the Texas Success Initiative Report (CBM002), Faculty Report (CBM008), end of semester Student Report (CBM0E1), and the Student Schedule Report (CBM00S) are included in this manual. Overviews of these changes are:

CBM002

The newest version of the Texas Success Initiative Report will be simplified to capture TSI data requirements only. Semester credit hours, courses, and grades will no longer be necessary since these will be captured in the CBM00S report.

CBM006

The CBM006 report will be retired with the implementation of the CBM00S report.

CBM008

The CBM008 report will be modified with the implementation of the CBM00S report. Course level elements have been added in order to properly associate student-faculty data based on courses reported in CBM00S. Also, the reporting period for the CBM008 will be moved to an end-of-semester report.

CBM0E1

Additionally, there will be a second collection for the CBM001 due for end-of-semester purposes and will be classified as "CBM0E1." This will allow the THECB to validate student records against the new Student Schedule report. The CBM00E1 and CBM00S reports will be due for the initial collection on September 30, 2011.



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

Susan E. Brown
Assistant Commissioner
Planning and Accountability
512/ 427-6153
susan.brown@thehb.state.tx.us
FAX: 512/ 427-6147

Gary W. Johnstone
Deputy Assistant Commissioner
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512/ 427-6287
doug.parker@thehb.state.tx.us
FAX: 512/ 427-6447

Kathy Cox
Assistant Director
Educational Data Analysis Support
Center
512/ 427-6286
kathy.cox@thehb.state.tx.us
FAX: 512/ 427-6447

MEMORANDUM

July 28, 2010

To: Public University Chief Reporting Officials
From: Doug Parker
Subject: Fall 2010 Reporting Manual Revisions

The Fall 2010 *Reporting and Procedures Manual for Texas Public Universities* has been revised to reflect the new 2010 CIP codes that you will begin using to report in the fall 2010 semester. New nursing codes have been incorporated into Item #32, Restricted Program Admission, on the CBM001. To view the complete list of the 2010 CIP Codes for Appendix C, go to our website at <http://www.txhighereddata.org/Interactive/CIP/>.

Appendix O, Classification of Instructional Program (CIP) Funding Categories for General Academic Institutions, has been revised to reflect the 2010 CIP codes.

The Fall 2010 *Reporting and Procedures Manual for Texas Public Universities* has been placed on the Coordinating Board website at <http://www.txhighereddata.org/ReportingManuals.cfm>. The Fall 2010 *Appendices to the Reporting and Procedures Manual* can be accessed at the same address.



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

MEMORANDUM

June 23, 2010

To: Public University Chief Reporting Officials
From: Doug Parker
Subject: Fall 2010 Reporting Manual

Susan E. Brown
Assistant Commissioner
Planning and Accountability
512/ 427-6153
susan.brown@thehb.state.tx.us
FAX: 512/ 427-6147

Gary W. Johnstone
Deputy Assistant Commissioner
Planning and Accountability
512/ 427-6139
gary.johnstone@thehb.state.tx.us
FAX: 512/ 427-6147

Janet Beinke
Director
Planning
512/ 427-6321
janet.beinke@thehb.state.tx.us
FAX: 512/ 427-6147

Linda L. Hargrove, Ph.D.
Director
Research and Evaluation
512/427-6122
linda.hargrove@thehb.state.tx.us
Fax: 512/427-6147

Thomas E. Keaton
Director
Finance & Resource Planning
512/ 427-6133
thomas.keaton@thehb.state.tx.us
FAX: 512/ 427-6147

Doug Parker
Director
Educational Data Center
512/ 427-6287
doug.parker@thehb.state.tx.us
FAX: 512/ 427-6447

Kathy Cox
Assistant Director
Educational Data Analysis Support
Center
512/ 427-6286
kathy.cox@thehb.state.tx.us
FAX: 512/ 427-6447

The Fall 2010 *Reporting and Procedures Manual for Texas Public Universities* has been placed on the Coordinating Board website at <http://www.txhighereddata.org/ReportingManuals.cfm>.

A description of additional reports/important dates has been added to the manual on page 0.1. These are reports that, in addition to the CBM reports, are due during the year. Institutions will be notified of actual due dates/deadlines for reports where no due date is specified.

As a reminder, the federally-required new ethnicity and race data items will be collected on the CBM001, CBM002, CBM008, CBM009, CBM00B, and CBM00X reports beginning in fall 2010. The current ethnicity field will be unused.

CBM001, CBM002, CBM004, and CBM006

Rider 59, under the Texas Higher Education Coordinating Board's appropriation in Senate Bill 1 as passed by the 81st Texas Legislature, allows institutions to offer approved non-semester-length developmental education interventions and allows institutions to claim formula funding for such interventions beginning in fall 2010. Information on the reporting of such interventions has been placed in the introductory sections of the CBM001, CBM002, and CBM004 reports. No items or fields on the CBM001, CBM002, CBM004, or CBM006 have been changed to accommodate the inclusion of these interventions.

CBM004 and CBM006

Item #20, Instruction Mode, has been modified to include code 6, Hybrid/Blended Course. A hybrid/blended course is a course in which a majority (at least 50 percent but less than 85 percent) of the planned instruction occurs when the students and instructor(s) are not in the same place. Code 2, Internet, has been replaced with Full Distance Education Course, which is a course which may have mandatory face-to-face sessions totaling no more than 15 percent of the instructional time. Examples of face-to-face sessions include orientation, laboratory, exam review, or an in-person test.



Texas Higher Education
COORDINATING BOARD
Planning and Accountability

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

MEMORANDUM

October 13, 2009

Susan E. Brown
Assistant Commissioner
Planning and Accountability
512/ 427-6153
susan.brown@thehb.state.tx.us
FAX: 512/ 427-6147

Gary W. Johnstone
Deputy Assistant Commissioner
Planning and Accountability
512/ 427-6139
gary.johnstone@thehb.state.tx.us
FAX: 512/ 427-6147

Janet Beinke
Director
Planning
512/ 427-6321
janet.beinke@thehb.state.tx.us
FAX: 512/ 427-6147

Thomas Keaton
Director
Finance & Resource Planning
512/ 427-6133
Thomas.Keaton@thehb.state.tx.us
FAX: 512/ 427-6147

Doug Parker
Director
Educational Data Center
512/ 427-6287
doug.parker@thehb.state.tx.us
FAX: 512/ 427-6447

Kathy Cox
Assistant Director
Educational Data Analysis Support
Center
512/ 427-6286
kathy.cox@thehb.state.tx.us
FAX: 512/ 427-6447

To: Public University Chief Reporting Officials
From: Doug Parker, Director, Educational Data Center
Subject: Changes to Fall 2009 Reporting Manual

The following modifications have been made to the Fall 2009 *Reporting and Procedures Manual* for the public universities.

1. A note has been added in the introductory section of the CBM001 concerning the reporting of distance education students:

Institutions should not report non-resident students who are taking only distance education courses delivered outside the state (TAC Title 19, Part 1, Chapter 4, Subchapter E, §4.107(c)(4) and §4.108(b)).

2. A note has been added in the introductory section of the CBM009 concerning the Nursing Shortage Reduction Program:

Institutions participating in the Nursing Shortage Reduction Program (NSRP) are required to submit their nursing graduates on the CBM009 by October 1. The nursing records must be error-free to be included in the count for funding.



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

Susan E. Brown
Assistant Commissioner
Planning and Accountability
512/ 427-6153
susan.brown@thehb.state.tx.us
FAX: 512/ 427-6147

Gary W. Johnstone
Deputy Assistant Commissioner
Planning and Accountability
512/ 427-6139
gary.johnstone@thehb.state.tx.us
FAX: 512/ 427-6147

Janet Beinke
Director
Planning
512/ 427-6321
janet.beinke@thehb.state.tx.us
FAX: 512/ 427-6147

Thomas Keaton
Director
Finance & Resource Planning
512/ 427-6133
Thomas.Keaton@thehb.state.tx.us
FAX: 512/ 427-6147

Doug Parker
Director
Educational Data Center
512/ 427-6287
doug.parker@thehb.state.tx.us
FAX: 512/ 427-6447

Kathy Cox
Assistant Director
Educational Data Analysis Support
Center
512/ 427-6286
kathy.cox@thehb.state.tx.us
FAX: 512/ 427-6447

MEMORANDUM

August 20, 2009

To: Public University Reporting Officials
From: Doug Parker
Subject: Fall 2009 Reporting Manual

The new federal requirement is that two new ethnicity/race questions be asked. The new ethnicity and race data items will be collected in the CBM001, CBM002, CBM008, CBM009, CBM00B, and CBM00X reports beginning fall 2010. Beginning fall 2009, the Coordinating Board will add two new optional ethnicity/race items as the last reporting items on the applicable reports. Institutions will be required to complete the current race/ethnicity item and may respond to the optional items to test coding of item elements.

The newest versions of the Texas Success Initiative Report (CBM002), Facilities Room Inventory Report (CBM011), and Facilities Building Inventory Report (CBM014) have been added to the manual.

CBM001

1. The instruction under Item #14, Ethnic Origin, on how to report students who are allowed to domicile in the U.S. (Note (c)) has been revised to read (c) Report the ethnicity of students who have applied to or have a petition pending with the Bureau of Citizenship and Immigration Services and students who base their residency on visas that allow them to domicile in the U.S.
2. The Restricted Program Admission codes (Item #32) for nursing have been expanded to include LVN to ADN (14) and LVN to BSN (15). Code 10 has been modified to read RN to BSN to more accurately identify those with ADN degrees and diplomas progressing towards a BSN.

CBM005

Item #7, Building, on the CBM005 has been expanded to 6 spaces; Item #8, Room, has been expanded to 16 spaces. Items #9 through #19 have changed beginning positions to accommodate the change in length for Items #7 and #8.

The due date has been moved from November 1 to November 15.



Texas Higher Education
COORDINATING BOARD
Planning and Accountability

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

MEMORANDUM

March 27, 2009

Susan E. Brown
Assistant Commissioner
Planning and Accountability
512/ 427-6153
susan.brown@thehb.state.tx.us
FAX: 512/ 427-6147

Gary W. Johnstone
Deputy Assistant Commissioner
Planning and Accountability
512/ 427-6139
gary.johnstone@thehb.state.tx.us
FAX: 512/ 427-6147

Janet Beinke
Director
Planning
512/ 427-6321
janet.beinke@thehb.state.tx.us
FAX: 512/ 427-6147

Thomas Keaton
Director
Finance & Resource Planning
512/ 427-6133
Thomas.Keaton@thehb.state.tx.us
FAX: 512/ 427-6147

Doug Parker
Director
Educational Data Center
512/ 427-6287
doug.parker@thehb.state.tx.us
FAX: 512/ 427-6447

Kathy Cox
Assistant Director
Educational Data Analysis Support
Center
512/ 427-6286
kathy.cox@thehb.state.tx.us
FAX: 512/ 427-6447

To: Public University Reporting Officials
From: Doug Parker
Subject: Spring 2009 Reporting Manual (replaces Fall 2007 manual)

Modifications to University CBM Report editing that are in effect

CBM001 – A new tuition waiver code has been added to Item #7, Tuition Status

A tuition waiver code of 'F' has been added that allows Texas universities within 100 miles of the state border to charge a lower rate than the regular out-of-state tuition rate to out-of-state students (TEC 54.0601 and CB rules Chapter 21, Subchapter B, Section 21.29 (5) (B)).

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.

University 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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Planning and Accountability

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

MEMORANDUM

August 12, 2008

Susan E. Brown
Assistant Commissioner
Planning and Accountability
512/ 427-6153
susan.brown@thehb.state.tx.us
FAX: 512/ 427-6147

Gary W. Johnstone
Deputy Assistant Commissioner
Planning and Accountability
512/ 427-6139
gary.johnstone@thehb.state.tx.us
FAX: 512/ 427-6147

Janet Beinke
Director
Planning
512/ 427-6321
janet.beinke@thehb.state.tx.us
FAX: 512/ 427-6147

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Director
Educational Data Center
512/ 427-6287
doug.parker@thehb.state.tx.us
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Center
512/ 427-6286
kathy.cox@thehb.state.tx.us
FAX: 512/ 427-6447

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>).



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Memorandum

May 30, 2008

Susan E. Brown
Assistant Commissioner
Planning and Accountability
512/ 427-6153
susan.brown@thehb.state.tx.us
FAX: 512/ 427-6147

Gary W. Johnstone
Deputy Assistant Commissioner
Planning and Accountability
512/ 427-6139
gary.johnstone@thehb.state.tx.us
FAX: 512/ 427-6147

Janet Beinke
Director
Planning
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FAX: 512/ 427-6147

Jeff D. Treichel
Director
Finance & Resource Planning
512/ 427-6122
jeff.treichel@thehb.state.tx.us
FAX: 512/ 427-6147

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Director
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Assistant Director
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Center
512/ 427-6286
kathy.cox@thehb.state.tx.us
FAX: 512/ 427-6447

To: University Reporting Officials
From: Doug Parker
Subject: Changes to 2007 Reporting Manual

Modifications to University 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

An error message will be generated if an institution reports zero first-time students in a Fall semester. A questionable message will be generated if an institution reports zero first-time students in a Spring or Summer 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 – New edit checks for Restricted Nursing Program Admission

The Restricted Nursing Program Admission major must be 51160100.

If Restricted Program Admission (Item 32) = 10, 11, 12, or 13 then Major (Item 18) must equal 51160100.

Restricted Nursing Program Admission - Initial RN licensure – master's level – UT Austin only

UT–Austin is the only institution allowed to report Restricted Program Admission (Item 32) = 13.

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

Enter a '2' in Item 27 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.

CBM001 – Doctoral items should be numeric for doctoral students

If a student is classified as Doctoral (Item 5 = '7') then spaces in Doctoral SCH Funded (Item 11) and/or Doctoral Funding Code (Item 19) will generate a questionable. Put zeros in Items 11 and 19 if the Doctoral student does not generate any Doctoral SCH during the reporting semester. This edit check will become an error in Fall 2008.

CBM001 – Institutions with Doctoral programs should generate Doctoral SCH

Institutions with approved Doctoral programs that generate zero Doctoral SCH will have an error or questionable message generated on the edit report. Fall and Spring reports will generate an error if zero Doctoral SCH is reported. Summer reports will generate a questionable if zero Doctoral SCH is reported. Institutions without approved Doctoral programs that generate Doctoral SCH will have a questionable message generated on the edit report. This message will appear on the Edit Summary following the error and questionable counts for each item.

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).

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.

CBM003 – Inactive CIP codes will not be allowed on the University Course inventory

A problem with the CIP code verification section of the CBM003 edit was found. In some circumstances inactive CIP codes were allowed.

CBM004 – The teaching load credits of each faculty member for each class section must be reported.

An error message will be generated if the sum of the Teaching Load Credit fields (Item 22) is less than 1.25 times the number of CBM004 records reported that semester.

Modifications to University CBM Report editing effective Fall 2008

CBM001 – Add a field (Item 36) 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>.

CBM001 – Derived Student IDs should not exceed 15% of your reported student records

CBM00B – will be checked against the CBM001 to find out how many students identified as Top 10% enrolled at your institution. A count of the Top 10% students will be provided on the CBM001 and CBM00B edit reports.

CBM00B – a new code – 07 (Associate/2-year degree) – will be added to Items 15 and 16 – Father's and Mother's Educational Level



Texas Higher Education
COORDINATING BOARD
Academic Excellence and Research
Planning and Accountability Division

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

Susan E. Brown.
Assistant Commissioner
Planning and Accountability
512/ 427-6153
susan.brown@thehb.state.tx.us
FAX: 512/ 427-6147

Janet Beinke
Director
Planning
512/ 427-6321
janet.beinke@thehb.state.tx.us
FAX: 512/427-6147

Casey M. Kennedy
Director
Web Services
512/ 427-6288
casey.kennedy@thehb.state.tx.us
FAX: 512/ 427-6447

Jeff D. Treichel
Director
Finance & Resource Planning
512/ 427-6122
jeff.treichel@thehb.state.tx.us
FAX: 512/427-6147

Kathy Cox
Assistant Director
Educational Data Analysis Support
Center
512/427-6286
kathy.cox@thehb.state.tx.us
FAX: 512/427-6447

M E M O R A N D U M

September 24, 2007

To: Public University Reporting Officials
From: Susan Brown
Subject: Changes to Fall 2007 Reporting Manual

This memo outlines the modifications being made to the electronic CBM Reporting Manual on the CB website. Please note that Alison Ingram is no longer responsible for the university CBM reports. Jocelyn Groce is now your contact person.

CBM001

An additional edit check has been incorporated to flag Item #6, Date of Birth, as questionable if age is less than 13 or greater than 19 when Item #31, Dual Credit SCH, is greater than zero. An additional edit check has been incorporated to flag Item #8, Residence, an error if coded anything other than a Texas resident if Item #20, Tuition Exemption/Waiver, is coded with a Hazlewood exemption.

CBM004

The last sentence in the first paragraph in the introductory section on page 4.1 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. Option 3 in Item #20, Instruction Mode, has been modified to read Video Tape/DVD and/or Broadcast TV.

CBM006

Option 3 in Item #20, Instruction Mode, has been modified to read Video Tape/DVD and/or Broadcast TV.



Texas Higher Education
COORDINATING BOARD
Academic Excellence and Research
Planning and Accountability Division

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

M E M O R A N D U M

April 12, 2007

Susan E. Brown.
Assistant Commissioner
Planning and Accountability
512/ 427-6153
susan.brown@thecb.state.tx.us
FAX: 512/ 427-6147

Janet Beinke
Director
Planning
512/ 427-6321
janet.beinke@thecb.state.tx.us
FAX: 512/427-6147

Casey M. Kennedy
Director
Web Services
512/ 427-6288
casey.kennedy@thecb.state.tx.us
FAX: 512/ 427-6447

Jeff D. Treichel
Director
Finance & Resource Planning
512/ 427-6122
jeff.treichel@thecb.state.tx.us
FAX: 512/427-6147

Kathy Cox
Assistant Director
Educational Data Analysis Support
Center
512/427-6286
kathy.cox@thecb.state.tx.us
FAX: 512/427-6447

To: Public University 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, CBM004, CBM008, and CBM00B reports will be October 15. Rather than reporting every other year in mid October, the due date will be the same every year. 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:

1. In Item #17 add a value of '6' that allows the University of Texas System to identify a student enrolled at a UT component as a Coordinated Admission Program student. These CAP students should be reported as first-time degree seeking at the current institution to be consistent with the IPEDS definition if the student intends to get a degree at any institution. This is effective for Summer 2007.
2. Added two new categories to Item #32, Restricted Program: 45 Doctor of Nursing Practice and 46 Doctor of Physical Therapy. Therefore the Questionable and Error Value page for Items #5 and #32 should be changed too. For Item #5, in the Error column add "Any value = 8 and Item #32 not equal 40-46". In the Error column for Item #32 add "When value = 40-46 and Item #5 not equal 8."
3. Require that the undergraduate program limit (Item #26) reported include both junior and senior students.

CBM003 Added the course inventory report.

CBM004 changes effective immediately:

Add the sentence that says to “Exclude students who audit a course.” to the second sentence in the Reporting for State Reimbursement section on page 4.1. On page 4.16 add codes of ‘5’ and ‘7’ to the off-campus possibilities.

CBM008 The salary ranges on the Questionable and Error page have been increased.

CBM009 Item #17 has been added to identify that the student graduated in a “Self-Supported program”. Use the code of X. These students should have been reported on the CBM00X report which is due on September 15 this year and thereafter.

CBM011 and CBM014, building and room reports have been added to the manual. **CBM00B** To align the references to the Common Application to the current version the following changes are to be made:

1. In Item #15 change Part D, 26 to Part I, 14.
2. In Item #16 change Part D, 26 to Part I, 14
3. In Item #18 change Part D, 28 to Part I, 15
4. In Item #19 change Part D, 29 to Part I, 13
5. In Item #20 change Part D, 30 to Part I, 17
6. In Item #21 change Part D, 31 to Part I, 16
7. Delete Item #17

CBM00E Add a sentence at the end of the first paragraph that says “A student who is in a program that skips the masters and goes directly into a doctoral program after a bachelors is to count the first 30 credit hours as though they were taken at the masters level.” In the third paragraph in the Introductory Section change the 75 or more hours back to 60 or more hours.

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.”

CBM00X This is a new annual report due September 15 each year. It is a student report to identify students enrolled in self-supported courses or programs at the university.



Texas Higher Education
COORDINATING BOARD
Academic Excellence and Research
Planning and Accountability Division
P. O. Box 12788 Austin, Texas 78711 • 1200 East Anderson Lane 78752

Susan E. Brown.
Assistant Commissioner
Planning and Accountability
512/ 427-6153
susan.brown@thehb.state.tx.us
FAX: 512/ 427-6147

September 13, 2006

M E M O R A N D U M

Janet Beinke
Director
Planning
512/ 427-6321
janet.beinke@thehb.state.tx.us
FAX: 512/427-6147

To: University Chief Reporting Officials and Institutional Researchers
From: Kenneth Dalley
Subject: Cost Study Report and CBM004/CBM006 Edit Change

Kenneth Dalley
Director
Educational Data Center
512/ 427-6306
kenneth.dalley@thehb.state.tx.us
FAX: 512/ 427-6447

Casey M. Kennedy
Director
Web Services
512/ 427-6288
casey.kennedy@thehb.state.tx.us
FAX: 512/ 427-6447

Jeff D. Treichel
Director
Finance & Resource Planning
512/ 427-6122
jeff.treichel@thehb.state.tx.us
FAX: 512/427-6147

Kathy Cox
Assistant Director
Educational Data Analysis Support
Center
512/427-6286
kathy.cox@thehb.state.tx.us
FAX: 512/427-6447

The name of a new report that recently began appearing in either the CBM004 or the CBM008 edit packet on the server is "FY 200X Cost Study CBM004/CBM008 Salary/SCH By Semester" (where X is the fiscal year of the study). The report summarizes the semester credit hours from the CBM004 and the dollars from the CBM008 allocated by level and fund for the current semester of the Fiscal Year Cost Study. The teaching faculty dollars are computed from the faculty who have an 01 and/or 02 appointment on the CBM008 and are distributed to each class section taught by a faculty member based on the TLCs reported on the CBM004. The dollars by CIP (class section) are then allocated by fund and level using the SCH criteria. This report shows the results of the dollar allocation. Rather than waiting until all semesters are certified and the fall and spring terms have gotten cold, this report will be provided immediately upon the CBM004/CBM008 Reports becoming error-free. Thus the opportunity to make changes to either of the reports will not be delayed until the next cost study is required. The expectation is that once the CBM004/CBM008 Reports are certified, they will not have to be re-evaluated when the Cost Study is actually being finalized. The one part that will not be sent until the worksheets are sent to the Finance Officer just prior to the Cost Study evaluation are the teaching faculty from the CBM008 that were not reported in a class record. Faculty from all three semesters will be provided in an Excel report for the semesters of the study. The worksheet will be sent to the reporting official so it can be provided to the Budget Office staff who should include those dollars on the TA worksheet as has been done in past Cost Studies.

The FY2006 Cost Study CBM004/CBM008 Salary/SCH By Semester for Fall 2005 and Spring 2006 reports will be posted to the Output area of the CB server by October 1 even though the next Cost Study will not be begun until January, unless EDC gets a push from higher authorities indicating that it must be done sooner. EDC recognizes that the formula runs for the appropriations will be coming in the latter part of October and that certification of the fall reports are needed for the Accountability reports by December 1.

Recently, in reviewing the CBM004 edits for the summer, many of the institutions were not reporting data in the TLC item (#22) on the CBM004. Thus a new electronic computation has been put into place to point this out. If the sum of the TLC item (remember it has 1 decimal position in the field) is not greater than 1.25 times the number of CBM004 records, the following error will be displayed just below the Edit Summary Report and the Total TLC row: "**** ERROR The Sum of TLC Is less than 1.25 Times the number of records **** ERROR *****". The 1.25 factor is a proxy. It was derived from the Spring reports.

For code value 9 (Individual Instruction) of Item #8 on the CBM004/CBM006, the phrase "Telecommunication Receiver" has been removed from the definition and the phrase "or students in individual instruction classes which are located off-campus" has been added.



Texas Higher Education
COORDINATING BOARD
Academic Excellence and Research
Planning and Accountability Division

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

MEMORANDUM

April 26, 2006

Susan E. Brown.
Assistant Commissioner
Planning and Accountability
512/ 427-6153
susan.brown@thehb.state.tx.us
FAX: 512/ 427-6147

Janet Beinke
Director
Planning
512/ 427-6321
janet.beinke@thehb.state.tx.us
FAX: 512/427-6147

Kenneth Dalley
Director
Educational Data Center
512/ 427-6306
kenneth.dalley@thehb.state.tx.us
FAX: 512/ 427-6447

Casey M. Kennedy
Director
Web Services
512/ 427-6288
casey.kennedy@thehb.state.tx.us
FAX: 512/ 427-6447

Jeff D. Treichel
Director
Finance & Resource Planning
512/ 427-6122
jeff.treichel@thehb.state.tx.us
FAX: 512/427-6147

Kathy Cox
Assistant Director
Educational Data Analysis Support
Center
512/427-6286
kathy.cox@thehb.state.tx.us
FAX: 512/427-6447

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 .



Texas Higher Education
COORDINATING BOARD
Academic Excellence and Research
Planning and Accountability Division

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

Susan E. Brown.
Assistant Commissioner
Planning and Accountability
512/ 427-6153
susan.brown@thehb.state.tx.us
FAX: 512/ 427-6147

Janet Beinke
Director
Planning
512/ 427-6321
janet.beinke@thehb.state.tx.us
FAX: 512/427-6147

Kenneth Dalley
Director
Educational Data Center
512/ 427-6306
kenneth.dalley@thehb.state.tx.us
FAX: 512/ 427-6447

Casey M. Kennedy
Director
Web Services
512/ 427-6288
casey.kennedy@thehb.state.tx.us
FAX: 512/ 427-6447

Jeff D. Treichel
Director
Finance & Resource Planning
512/ 427-6122
jeff.treichel@thehb.state.tx.us
FAX: 512/427-6147

Kathy Cox
Assistant Director
Educational Data Analysis Support
Center
512/427-6286
kathy.cox@thehb.state.tx.us
FAX: 512/427-6447

M E M O R A N D U M

April 19, 2006

To: Public University 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.

There have been some staff changes which are identified on page 0.2 and 0.3.

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 #20. 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. The Dual Credit hours (Item #31) of high school students must be a subset of the total credit hours, less developmental hours, for a student. Therefore, the error condition of Item #31 on the Questionable and Error page has been updated for this limitation. In the Census Date table in the Introduction section of the CBM001, the length of term (first column) has been changed to read "16 or more" in the last row.

Since EDC has been given the responsibility to monitor the university course inventory, a Chapter 3 has been inserted that identifies the reporting requirements.

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



Texas Higher Education
COORDINATING BOARD
Academic Excellence and Research
Planning and Accountability Division

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

M E M O R A N D U M

March 8, 2006

Susan E. Brown.
Assistant Commissioner
Planning and Accountability
512/ 427-6153
susan.brown@thehb.state.tx.us
FAX: 512/ 427-6147

Janet Beinke
Director
Planning
512/ 427-6321
janet.beinke@thehb.state.tx.us
FAX: 512/427-6147

Kenneth Dalley
Director
Educational Data Center
512/ 427-6306
kenneth.dalley@thehb.state.tx.us
FAX: 512/ 427-6447

Casey M. Kennedy
Director
Web Services
512/ 427-6288
casey.kennedy@thehb.state.tx.us
FAX: 512/ 427-6447

Jeff D. Treichel
Director
Finance & Resource Planning
512/ 427-6122
jeff.treichel@thehb.state.tx.us
FAX: 512/427-6147

Kathy Cox
Assistant Director
Educational Data Analysis Support
Center
512/427-6286
kathy.cox@thehb.state.tx.us
FAX: 512/427-6447

To: University Reporting Officials
From: Kenneth Dalley
Subject: **CBM00E Due April 14, 2006** and Summer CBM008 begins this year

An electronic list identifying active Fall 2005 students at your institution with 75 or more doctoral-level semester credit hours has been posted to your institution's output area on the Coordinating Board server. Included also are active doctoral students over the past calendar year (2005) who have an individual exception (coded "I") but were not enrolled in the Fall 2005 term. The file name is called "00FICEDoctoralExceptions2005.txt". The format of this list aligns with the record description of the CBM00E. Since we are late posting this file, the due date has been delayed until **Friday, April 14, 2006**. The VP for Academic Affairs or Provost is to review this list to see if any of the students with an individual exception have exceeded the doctoral funding limit of 130 doctoral hours and submit an "R" in the exception code which will inform the CB to remove them from the exception list. Also identify up to your institution's individual exception limit other students that you wish to be excluded from the 99 hour limitation in the next appropriation cycle. Students that qualify for program exceptions are to be identified with a "P" too. Return the report as your CBM00E file. By the end of next week your VP for Academic Affairs or Provost will receive a memo indicating that this file has been posted. An attachment to that memo will contain the number of students eligible to be identified with an individual exception. If your institution does not have doctoral students who have attempted over 75 semester credit hours, your institution will not receive an electronic exceptions file. The Word attachment identifies the program exception categories by institution. The EXCEL attachment indicates the number of student records on the posted file and the number of doctoral students who currently have an individual exception and the number of those that exceed the 130 hour limit.

In order to capture summer faculty costs associated with instruction for the annual Cost Study, the public universities will be required to submit a summer faculty report (CBM008) beginning this summer. The due date will coincide with the class report (CBM004) which is August 15, 2006. The following sentence will be added to the first paragraph in the introductory section of the reporting manual: A combined summer report will reflect conditions as of the official census dates for any terms taught during the summer and any faculty who taught spring flex-entry classes. The only other change to the standard CBM008 report will be an explanation in Item #13 that deals with the Percent of Time of summer faculty. (It is the bolded sentence.)

Item #13 Percent of Time. Enter the faculty member's percent of time in relation to a full or normal workload at the institution for each appointment (Items #13A-E) during the reporting period. **For a**

faculty that teaches in the summer consider that a 100 percent summer workload is equivalent to a 100 percent workload in a fall or spring term. So a faculty teaching one class in the summer would be considered to have a 25% assignment if four classes is considered a full or normal workload. Each institution has a policy that determines a full or normal workload (example, 12 semester credit hours, four classes, etc.). For multiple assignments, apportion the percent of time according to the contracted or required duties. The total percent time must never exceed 100 percent. A teaching assignment that is considered an overload has a zero percent value. Thus, only the salary of an overload is reported. Enter leading zeros for any percent less than 100 and all zeros for the percent of any appointment that does not apply.



Texas Higher Education
COORDINATING BOARD
Academic Excellence and Research
Planning and Accountability Division

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

Susan E. Brown

Interim Assistant Commissioner
Planning and Accountability
512/ 427-6153
susan.brown@thehb.state.tx.us
FAX: 512/ 427-6127

Janet Beinke

Director
Planning
512/ 427-6321
janet.beinke@thehb.state.tx.us
FAX: 512/427-6168

Kenneth Dalley

Director
Educational Data Center
512/ 427-6306
kenneth.dalley@thehb.state.tx.us
FAX: 512/ 427-6447

Casey M. Kennedy

Director
Web Services
512/ 427-6288
casey.kennedy@thehb.state.tx.us
FAX: 512/ 427-6447

Kathy Cox

Assistant Director
Educational Data Analysis Support
Center
512/427-6286
kathy.benson@thehb.state.tx.us
FAX: 512/427-6447

Nancy Ellen Soteriou

Assistant Director
Resource Planning
512/427-6110
nancy.soteriou@thehb.state.tx.us
FAX: 512/427-6147

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.



Texas Higher Education
COORDINATING BOARD
Academic Excellence and Research
Planning and Accountability Division
P. O. Box 12788 Austin, Texas 78711 • 1200 East Anderson Lane 78752

M E M O R A N D U M

October 30, 2005

Susan E. Brown
Interim Assistant Commissioner
Planning and Accountability
512/ 427-6153
susan.brown@thehb.state.tx.us
FAX: 512/ 427-6127

Janet Beinke
Director
Planning
512/ 427-6321
janet.beinke@thehb.state.tx.us
FAX: 512/427-6168

Kenneth Dalley
Director
Educational Data Center
512/ 427-6306
kenneth.dalley@thehb.state.tx.us
FAX: 512/ 427-6447

Casey M. Kennedy
Director
Web Services
512/ 427-6288
casey.kennedy@thehb.state.tx.us
FAX: 512/ 427-6447

Kathy Cox
Assistant Director
Educational Data Analysis Support
Center
512/427-6286
kathy.benson@thehb.state.tx.us
FAX: 512/427-6447

Nancy Ellen Soteriou
Assistant Director
Resource Planning
512/427-6110
nancy.soteriou@thehb.state.tx.us
FAX: 512/427-6147

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.



Texas Higher Education
COORDINATING BOARD
Academic Excellence and Research
Planning and Accountability Division
P. O. Box 12788 Austin, Texas 78711 • 1200 East Anderson Lane 78752

Deborah L. Greene, Ph.D.
Acting Assistant Commissioner
Planning and Accountability
512/ 427-6130
deborah.greene@thehb.state.tx.us
FAX: 512/ 427-6147

Susan E. Brown
Deputy Assistant Commissioner
Planning and Accountability
512/ 427-6153
susan.brown@thehb.state.tx.us
FAX: 512/ 427-6127

Janet Beinke
Director
Planning
512/ 427-6321
janet.beinke@thehb.state.tx.us
FAX: 512/427-6168

Kenneth Dalley
Director
Educational Data Center
512/ 427-6306
kenneth.dalley@thehb.state.tx.us
FAX: 512/ 427-6447

Casey M. Kennedy
Director
Web Services
512/ 427-6288
casey.kennedy@thehb.state.tx.us
FAX: 512/ 427-6447

Kathy Benson
Assistant Director
Educational Data Analysis Support
Center
512/427-6286
kathy.benson@thehb.state.tx.us
FAX: 512/427-6447

Nancy Ellen Soteriou
Assistant Director
Resource Planning
512/427-6110
nancy.soteriou@thehb.state.tx.us
FAX: 512/427-6147

M E M O R A N D U M

September 29, 2005

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.



Texas Higher Education
COORDINATING BOARD
Academic Excellence and Research
Planning and Accountability Division

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

Susan E. Brown
Interim Assistant Commissioner
Planning and Accountability
512/ 427-6153
susan.brown@theb.state.tx.us
FAX: 512/ 427-6127

Janet Beinke
Director
Planning
512/ 427-6321
janet.beinke@theb.state.tx.us
FAX: 512/427-6168

Kenneth Dalley
Director
Educational Data Center
512/ 427-6306
kenneth.dalley@theb.state.tx.us
FAX: 512/ 427-6447

Casey M. Kennedy
Director
Web Services
512/ 427-6288
casey.kennedy@theb.state.tx.us
FAX: 512/ 427-6447

Kathy Cox
Assistant Director
Educational Data Analysis Support
Center
512/427-6286
kathy.benson@theb.state.tx.us
FAX: 512/427-6447

Nancy Ellen Soteriou
Assistant Director
Resource Planning
512/427-6110
nancy.soteriou@theb.state.tx.us
FAX: 512/427-6147

M E M O R A N D U M

September 27, 2005

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



Texas Higher Education
COORDINATING BOARD
Academic Excellence and Research
Planning and Accountability Division

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

Susan E. Brown
Interim Assistant Commissioner
Planning and Accountability
512/ 427-6153
susan.brown@thehb.state.tx.us
FAX: 512/ 427-6127

September 2, 2005

Janet Beinke
Director
Planning
512/ 427-6321
janet.beinke@thehb.state.tx.us
FAX: 512/427-6168

M E M O R A N D U M

Kenneth Dalley
Director
Educational Data Center
512/ 427-6306
kenneth.dalley@thehb.state.tx.us
FAX: 512/ 427-6447

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**

Casey M. Kennedy
Director
Web Services
512/ 427-6288
casey.kennedy@thehb.state.tx.us
FAX: 512/ 427-6447

Kathy Cox
Assistant Director
Educational Data Analysis Support
Center
512/427-6286
kathy.benson@thehb.state.tx.us
FAX: 512/427-6447

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.

Nancy Ellen Soteriou
Assistant Director
Resource Planning
512/427-6110
nancy.soteriou@thehb.state.tx.us
FAX: 512/427-6147

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

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.

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.



Texas Higher Education
COORDINATING BOARD
Academic Excellence and Research
Planning and Accountability Division

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

Deborah L. Greene, Ph.D.
Acting Assistant Commissioner
Planning and Accountability
512/ 427-6130
deborah.greene@thehb.state.tx.us
FAX: 512/ 427-6147

Susan E. Brown
Deputy Assistant Commissioner
Planning and Accountability
512/ 427-6153
susan.brown@thehb.state.tx.us
FAX: 512/ 427-6127

Janet Beinke
Director
Planning
512/ 427-6321
janet.beinke@thehb.state.tx.us
FAX: 512/427-6168

Kenneth Dalley
Director
Educational Data Center
512/ 427-6306
kenneth.dalley@thehb.state.tx.us
FAX: 512/ 427-6447

David H. Gill, Ph.D.
Director
Performance Systems
512/ 427-6233
david.gill@thehb.state.tx.us
FAX: 512/ 427-6444

Casey M. Kennedy
Director
Web Services
512/ 427-6288
casey.kennedy@thehb.state.tx.us
FAX: 512/ 427-6447

Kathy Benson
Assistant Director
Educational Data Analysis Support
Center
512/427-6286
kathy.benson@thehb.state.tx.us
FAX: 512/427-6447

Nancy Ellen Soteriou
Assistant Director
Resource Planning
512/427-6110
nancy.soteriou@thehb.state.tx.us
FAX: 512/427-6147

M E M O R A N D U M

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.



Texas Higher Education
COORDINATING BOARD
Academic Excellence and Research
Planning and Accountability Division

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

Deborah L. Greene, Ph.D.
Acting Assistant Commissioner
Planning and Accountability
512/ 427-6130
deborah.greene@thehb.state.tx.us
FAX: 512/ 427-6147

Susan E. Brown
Deputy Assistant Commissioner
Planning and Accountability
512/ 427-6153
susan.brown@thehb.state.tx.us
FAX: 512/ 427-6127

Janet Beinke
Director
Planning
512/ 427-6321
janet.beinke@thehb.state.tx.us
FAX: 512/427-6168

Kenneth Dalley
Director
Educational Data Center
512/ 427-6306
kenneth.dalley@thehb.state.tx.us
FAX: 512/ 427-6447

David H. Gill, Ph.D.
Director
Performance Systems
512/ 427-6233
david.gill@thehb.state.tx.us
FAX: 512/ 427-6444

Casey M. Kennedy
Director
Web Services
512/ 427-6288
casey.kennedy@thehb.state.tx.us
FAX: 512/ 427-6447

Kathy Benson
Assistant Director
Educational Data Analysis Support
Center
512/427-6286
kathy.benson@thehb.state.tx.us
FAX: 512/427-6447

Nancy Ellen Soteriou
Assistant Director
Resource Planning
512/427-6110
nancy.soteriou@thehb.state.tx.us
FAX: 512/427-6147

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.



Texas Higher Education
COORDINATING BOARD
Academic Excellence and Research
Planning and Accountability Division
P. O. Box 12788 Austin, Texas 78711 • 1200 East Anderson Lane 78752

M E M O R A N D U M

June 28, 2005

Deborah L. Greene, Ph.D.
Acting Assistant Commissioner
Planning and Accountability
512/ 427-6130
deborah.greene@thehb.state.tx.us
FAX: 512/ 427-6147

Susan E. Brown
Deputy Assistant Commissioner
Planning and Accountability
512/ 427-6153
susan.brown@thehb.state.tx.us
FAX: 512/ 427-6127

Janet Beinke
Director
Planning
512/ 427-6321
janet.beinke@thehb.state.tx.us
FAX: 512/427-6168

Kenneth Dalley
Director
Educational Data Center
512/ 427-6306
kenneth.dalley@thehb.state.tx.us
FAX: 512/ 427-6447

David H. Gill, Ph.D.
Director
Performance Systems
512/ 427-6233
david.gill@thehb.state.tx.us
FAX: 512/ 427-6444

Casey M. Kennedy
Director
Web Services
512/ 427-6288
casey.kennedy@thehb.state.tx.us
FAX: 512/ 427-6447

Kathy Benson
Assistant Director
Educational Data Analysis Support
Center
512/427-6286
kathy.benson@thehb.state.tx.us
FAX: 512/427-6447

Nancy Ellen Soteriou
Assistant Director
Resource Planning
512/427-6110
nancy.soteriou@thehb.state.tx.us
FAX: 512/427-6147

To: All Public Institutions Reporting Officials and Institutional Researchers
From: Kenneth Dalley
Subject: Changes Fall 2005 Manual rev Fall 2005.1

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 TSI **CBM002** reporting guidelines that deal with ACT/SAT exemptions (pages 2.1 and 2.2) have been modified to remove the Spring 2004 cut-off date for implementation of sectional exceptions versus the "all or nothing" concepts of historical reporting. Since Board rule does not include such a date limitation, the Reporting Manual has been modified to allow sectional exemptions if the ACT/SAT test is still active (not expired). Effective immediately, the current CBM002 edit will allow such a change but an institution will not be allowed to make retroactive changes to certified reports to implement the sectional exemptions for active ACT/SAT tests. The wording in the CBM002 report is changed to read as follows:

ACT: For active tests, a composite score of 23 with a minimum of 19 on the English and/or the mathematics tests shall exempt a student for the corresponding section(s).

SAT: For active tests, a combined critical reading (verbal) and mathematics score of 1070 with a minimum of 500 on the critical reading test and/or the mathematics tests shall exempt a student for the corresponding section(s).

Only one combined summer term CBM002 report will be accepted in October from the community, technical, and state colleges. Two separate summer reports will be rejected this year.

For the **universities**, Item #22 (Teaching Load Credits) on the Class Report (**CBM004**) will be required effective with Fall 2005 reporting. The funding rate table based on the past 3 cost studies was used in the appropriation process for the university (general academics) allocations. Thus the cost study will be continued so that 3-year average rates by level can be determined each base year. The fiscal Year 2005 Cost Study will use the same processing as the prior three studies since the Teaching Load Credit item has not been reported on the CBM004 during this fiscal year. I will recommend that the FY2005 study be done in Spring 2006.

Anissa Wagner (512.427.6313) has been transferred from the old Community College Division to EDC to help with program inventory updates. She will also be responsible for the CBM student reports of the **two-year colleges** that Jocelyn Groce has been handling. Jocelyn will support the class-type reports that Charles Busbey had been responsible for until he moved to another division. These changes are reflected on 0.2 of the manual.



Texas Higher Education
COORDINATING BOARD
Academic Excellence and Research
Planning and Accountability Division

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

Deborah L. Greene, Ph.D.
Acting Assistant Commissioner
Planning and Accountability
512/ 427-6130
deborah.greene@thehb.state.tx.us
FAX: 512/ 427-6147

Susan E. Brown
Deputy Assistant Commissioner
Planning and Accountability
512/ 427-6153
susan.brown@thehb.state.tx.us
FAX: 512/ 427-6127

Janet Beinke
Director
Planning
512/ 427-6321
janet.beinke@thehb.state.tx.us
FAX: 512/427-6168

Kenneth Dalley
Director
Educational Data Center
512/ 427-6236
kenneth.dalley@thehb.state.tx.us
FAX: 512/ 427-6447

David H. Gill, Ph.D.
Director
Performance Systems
512/ 427-6233
david.gill@thehb.state.tx.us
FAX: 512/ 427-6444

Casey M. Kennedy
Director
Web Services
512/ 427-6288
casey.kennedy@thehb.state.tx.us
FAX: 512/ 427-6447

Kathy Benson
Assistant Director
Educational Data Analysis Support
Center
512/427-6286
kathy.benson@thehb.state.tx.us
FAX: 512/427-6447

Nancy Ellen Soteriou
Assistant Director
Resource Planning
512/427-6110
nancy.soteriou@thehb.state.tx.us
FAX: 512/427-6147

M E M O R A N D U M

April 19, 2005

To: Public University Reporting Officials and Institutional Researchers
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 Item #5 a student in any special professional program will be coded an '8' and identified with the appropriate code in Item #32.
2. 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.
3. 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.
4. 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, DVM, Optometry) 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.
5. The note in Item #12 was expanded to help identify when to report a student with an international code or the appropriate ethnicity.
6. Item #18 indicates that a valid CIP code is expected for a student's major program when reported as a graduate student.
7. The name of Item #32 has changed to "Restricted Program Admission". Entrance into or continuation in one of the restricted programs identified in the list are to be reported. Students in teacher education, in health-related programs and in the graduate special professional programs are identified. Audiology is a new category in the special professional group.
8. The definition of Item #33 has been expanded to allow the institution to identify any level of student as non-degree-seeking.

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

1. 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.

2. 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.
3. On the Questionable and Error Values page, the error values for Items #24C/34C/44C are more restrictive.

CBM004 changes effective Fall 2005 Reporting:

1. In the section on Distance Education and Off-Campus Instruction, the center in Round Rock has a name change and a new center added in Fort Worth for UT Arlington. The MITC at Fort Bend is now identified as at Sugarland.
2. Add Item #22, Teaching Load Credit, pending legislative approval of cost study.

CBM008 to be changed for Fall 2005 Report:

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 birth date 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 #13 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 #14 Last Name. Enter the student's last name. Truncate if the name contains over 20 characters.
5. Add Item #15 First Name. Enter the student's first name. Truncate if the name contains over 10 characters.
6. Add Item #16 Middle Name Initial. Enter the initial of the student's middle name.

CBM00B changes for Fall 2005 reporting:

In Item #14, the Undergraduate categories are more explicit, and a new code for acceptance of graduates has been incorporated.



Texas Higher Education COORDINATING BOARD

DIVISION OF PLANNING AND INFORMATION RESOURCES
P. O. Box 12788 Austin, Texas 78711 • 1200 East Anderson Lane 78752

David W. Gardner, Ph.D.
Assistant Commissioner
Planning and Information Resources
512/ 427-6146
gardnerdd@thehb.state.tx.us
FAX: 512/ 427-6127

MEMORANDUM

September 16, 2004

Susan E. Brown
Director
Planning
512/ 427-6153
brownsn@thehb.state.tx.us
FAX: 512/ 427-6127

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

John R. Cox
Director
Information Resources
512/ 427-6300
coxjn@thehb.state.tx.us
FAX: 512/ 427-6447

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)

Casey M. Kennedy
Director
Web Services
512/ 427-6288
kennedycy@thehb.state.tx.us
FAX: 512/ 427-6447



Texas Higher Education COORDINATING BOARD

DIVISION OF PLANNING AND INFORMATION RESOURCES
P. O. Box 12788 Austin, Texas 78711 • 1200 East Anderson Lane 78752

MEMORANDUM

August 16, 2004

David W. Gardner, Ph.D.
Assistant Commissioner
Planning and Information Resources
512/ 427-6146
gardnerdd@thehb.state.tx.us
FAX: 512/ 427-6127

Susan E. Brown
Director
Planning
512/ 427-6153
brownnsn@thehb.state.tx.us
FAX: 512/ 427-6127

John R. Cox
Director
Information Resources
512/ 427-6300
coxjn@thehb.state.tx.us
FAX: 512/ 427-6447

Casey M. Kennedy
Director
Web Services
512/ 427-6288
kennedycy@thehb.state.tx.us
FAX: 512/ 427-6447

To: Public University Reporting Officials and Institutional Researchers
From: Kenneth Dalley
Subject: Changes to Spring 2004 Reporting Manual – Rev 6
Fall CBM001/CBM004 due October 20, 2004 for Appropriations
Spring CBM001/CBM004 due February 16, 2005

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 #12 Note b) Report international students who qualify under Section 2 of HB 1403 (coded 'A' in Item #7) as international students even though they qualify for resident status for tuition and fee purposes (rather than by ethnicity).
2. Change Item #33 from Unused to Undergraduate Non-Degree-Seeking Student. For an undergraduate student who does not plan to pursue an associate or bachelor's degree at your institution, enter a '1', else enter '0'. This item will be used to exclude the student in graduation rate reports.

CBM00B to be changed for Fiscal Year 2004 Report:

1. Provide the ACT/SAT composite scores used to accept or deny an applicant as defined in the institution's admission policy. Insert as sentence two in Items #25 and #26.

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

DIVISION OF PLANNING AND INFORMATION RESOURCES
P. O. Box 12788 Austin, Texas 78711 • 1200 East Anderson Lane 78752

MEMORANDUM

June 15, 2004

David W. Gardner, Ph.D.
Assistant Commissioner
Planning and Information Resources
512/ 427-6146
gardnerdd@thehb.state.tx.us
FAX: 512/ 427-6127

Susan E. Brown
Director
Planning
512/ 427-6153
brownsn@thehb.state.tx.us
FAX: 512/ 427-6127

John R. Cox
Director
Information Resources
512/ 427-6300
coxjn@thehb.state.tx.us
FAX: 512/ 427-6447

Casey M. Kennedy
Director
Web Services
512/ 427-6288
kennedycy@thehb.state.tx.us
FAX: 512/ 427-6447

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.



Texas Higher Education COORDINATING BOARD

DIVISION OF PLANNING AND INFORMATION RESOURCES
P. O. Box 12788 Austin, Texas 78711 • 1200 East Anderson Lane 78752

David W. Gardner, Ph.D.
Assistant Commissioner
Planning and Information Resources
512/ 427-6146
gardnerdd@thecb.state.tx.us
FAX: 512/ 427-6127

MEMORANDUM

June 7, 2004

Susan E. Brown
Director
Planning
512/ 427-6153
brownsn@thecb.state.tx.us
FAX: 512/ 427-6127

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

John R. Cox
Director
Information Resources
512/ 427-6300
coxjn@thecb.state.tx.us
FAX: 512/ 427-6447

Casey M. Kennedy
Director
Web Services
512/ 427-6288
kennedycy@thecb.state.tx.us
FAX: 512/ 427-6447

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).



Texas Higher Education COORDINATING BOARD

DIVISION OF PLANNING AND INFORMATION RESOURCES
P. O. Box 12788 Austin, Texas 78711 • 1200 East Anderson Lane 78752

MEMORANDUM

May 13, 2004

David W. Gardner, Ph.D.
Assistant Commissioner
Planning and Information Resources
512/ 427-6146
gardnerdd@thehb.state.tx.us
FAX: 512/ 427-6127

Susan E. Brown
Director
Planning
512/ 427-6153
brownnsn@thehb.state.tx.us
FAX: 512/ 427-6127

John R. Cox
Director
Information Resources
512/ 427-6300
coxjn@thehb.state.tx.us
FAX: 512/ 427-6447

Casey M. Kennedy
Director
Web Services
512/ 427-6288
kennedycy@thehb.state.tx.us
FAX: 512/ 427-6447

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

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.



Texas Higher Education COORDINATING BOARD

DIVISION OF PLANNING AND INFORMATION RESOURCES
P. O. Box 12788 Austin, Texas 78711 • 1200 East Anderson Lane 78752

MEMORANDUM

David W. Gardner, Ph.D.
Assistant Commissioner
Planning and Information Resources
512/ 427-6146
gardnerd@thecb.state.tx.us
FAX: 512/ 427-6127

April 26, 2004

Susan E. Brown
Director
Planning
512/ 427-6153
brownsn@thecb.state.tx.us
FAX: 512/ 427-6127

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

John R. Cox
Director
Information Resources
512/ 427-6300
coxjn@thecb.state.tx.us
FAX: 512/ 427-6447

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/>.

Casey M. Kennedy
Director
Web Services
512/ 427-6288
kennedycy@thecb.state.tx.us
FAX: 512/ 427-6447

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 4.6 of the Reporting Manual. The certification deadline for the Spring CBM001 and CBM004 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.

The certification instructions on page 0.7 have been updated to reflect current processing.



Texas Higher Education COORDINATING BOARD

DIVISION OF PLANNING AND INFORMATION RESOURCES
P. O. Box 12788 Austin, Texas 78711 • 1200 East Anderson Lane 78752

David W. Gardner, Ph.D.
Assistant Commissioner
Planning and Information
Resources
512/ 427-6146
gardnerdd@thehb.state.tx.us
FAX: 512/ 427-6127

MEMORANDUM

February 2, 2004

Susan E. Brown
Director
Planning
512/ 427-6153
brownsn@thehb.state.tx.us
FAX: 512/ 427-6127

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

John R. Cox
Director
Information Resources
512/ 427-6300
coxjn@thehb.state.tx.us
FAX: 512/ 427-6447

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.

Casey M. Kennedy
Director
Web Services
512/ 427-6288
kennedycy@thehb.state.tx.us
FAX: 512/ 427-6447

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.theccb.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.theccb.state.tx.us/CBRules/proposed.htm>, Chapter 13, Subchapter B, Section 13.25.)



Texas Higher Education COORDINATING BOARD

DIVISION OF PLANNING AND INFORMATION RESOURCES
P. O. Box 12788 Austin, Texas 78711 • 1200 East Anderson Lane 78752

David W. Gardner, Ph.D.
Assistant Commissioner
Planning and Information
Resources
512/ 427-6146
gardnerdd@thecb.state.tx.us
FAX: 512/ 427-6127

MEMORANDUM

December 8, 2003

Susan E. Brown
Director
Planning
512/ 427-6153
brownsn@thecb.state.tx.us
FAX: 512/ 427-6127

To: Public University Reporting Officials
and Institutional Researchers

From: Kenneth Dalley

Subject: Change of the word Repeated to Attempted
Also changed Item #8 CBM004

John R. Cox
Director
Information Resources
512/ 427-6300
coxjn@thecb.state.tx.us
FAX: 512/ 427-6447

Casey M. Kennedy
Director
Web Services
512/ 427-6288
kennedycy@thecb.state.tx.us
FAX: 512/ 427-6447

In the December 5, 2003 Memo there were references to the limitation of funding due to repeating of courses that conveyed the wrong message. The memo and the Spring 2004 Reporting Manual have been changed to say "attempted" the same course rather than "repeated" the same course more than twice.

The guidelines incorporated in the Reporting Manual were as published in the October 16th Memo of the Commissioner. The Coordinating Board will consider proposed rules on Section 50 that incorporate these guideline at its January 2004 meeting. Final action on the rules will be at its April 2004 meeting.

The definition of Individual instruction courses, code 9 in Item #8 on the CBM004 has been modified.



Texas Higher Education COORDINATING BOARD

DIVISION OF PLANNING AND INFORMATION RESOURCES
P. O. Box 12788 Austin, Texas 78711 • 1200 East Anderson Lane 78752

David W. Gardner, Ph.D.
Assistant Commissioner
Planning and Information
Resources
512/ 427-6146
gardnerdd@thecb.state.tx.us
FAX: 512/ 427-6127

MEMORANDUM

December 5, 2003

Susan E. Brown
Director
Planning
512/ 427-6153
brownsn@thecb.state.tx.us
FAX: 512/ 427-6127

To: Public University Reporting Officials
and Institutional Researchers

John R. Cox
Director
Information Resources
512/ 427-6300
coxjn@thecb.state.tx.us
FAX: 512/ 427-6447

From: Kenneth Dalley

Subject: Spring 2004 Reporting Manual & Appendices

Casey M. Kennedy
Director
Web Services
512/ 427-6288
kennedycy@thecb.state.tx.us
FAX: 512/ 427-6447

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 Universities." 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 – In the Introductory Section on page 1.3 a discussion of two new reports on undergraduate students who are approaching or have exceeded the undergraduate funding limit has been included. There is also a paragraph about the funding limitation for Doctoral students.

Item #21, SCH—Load Not State Funded, has been expanded to include graduate students due to the limitation on attempting the same course more than twice. The semester credit hours of seniors within 12 hours of their first baccalaureate have been

Memorandum
December 5, 2003
Page 2

moved to their own item, Item #35. These items will be summarized on the Summary of Student Data report.

In Item #31, Semester Credit Hours in Dual Credit Courses, the definition leaves out the funding requirements in order to be considered Dual Credit.

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

CBM004 -- In the introductory section, page 4.4, a new paragraph has been inserted that discusses the limitation of funding of courses that have been attempted more than twice.

Item #16, Enrollments of Students Who Exceed State Funding Limits, has been broadened to include students who have attempted the same course more than twice.

CBM005 -- Item #16, Enrollments of Students Who Exceed State Funding Limits, has been broadened to include students who have attempted the same course more than twice and are ineligible to be submitted for state funding.

CBM006 -- Item #16, Enrollments of Students Who Exceed State Funding Limits, has been broadened to include students who have attempted the same course more than twice and are ineligible to be submitted for state funding.

CBM00B – Item #25 has been added to collect the ACT composite score of first-time undergraduate students.

Item #26 has been added to collect the SAT composite score of first-time undergraduate students.

The record length has been increase to 96.

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

P.O. Box 12788 Austin, Texas 78711

Pamela P. Willeford
CHAIR
Martin Basaldua, M.D.
VICE CHAIR
Raul B. Fernandez
SECRETARY OF THE BOARD

MEMORANDUM

October 16, 2003

Neal W. Adams
Ricardo G. Cigarroa, M.D.
Marc Cisneros
Kevin P. Eltife
Jerry Farrington
Cathy Obriotti Green
Gerry Griffin
Carey Hobbs
Adair Margo
Lorraine Perryman
Curtis Ransom
Hector de J. Ruiz, Ph.D.
Robert W. Shepard
Windy Sitton
Terdemia L. Ussery II

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
COMMISSIONER
OF HIGHER EDUCATION

512/ 427-6101
Fax 512/ 427-6127

Web site:
<http://www.thecb.state.tx.us>

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

DIVISION OF PLANNING AND INFORMATION RESOURCES
P. O. Box 12788 Austin, Texas 78711 • 1200 East Anderson Lane 78752

David W. Gardner, Ph.D.
Assistant Commissioner
Planning and Information
Resources
512/ 427-6146
gardnerdd@thecb.state.tx.us
FAX: 512/ 427-6127

December 30, 2002

MEMO

Susan E. Brown
Director
Planning
512/ 427-6153
brownnsn@thecb.state.tx.us
FAX: 512/ 427-6127

To: University Reporting Officials and Institutional Researchers

From: Kenneth Dalley

Subject: September 1999 Reporting Manual revision 9
Report changes for CBM001

John R. Cox
Director
Information Resources
512/ 427-6300
coxjn@thecb.state.tx.us
FAX: 512/ 427-6447

The following CBM change will be included in the web manual by January 10th to be effective immediately:

Casey M. Kennedy
Director
Web Services
512/ 427-6288
kennedycy@thecb.state.tx.us
FAX: 512/ 427-6447

The reporting option on the CBM004 that allows seniors within 12 sch of their first baccalaureate who are enrolled in master's level courses for master's level credit presents a challenge on how to report the semester credit hours of these senior students on the CBM001 when the seniors are affected by the 45+ undergraduate limit. This dilemma was discussed with our legal counsel and it has been determined that these sch which are funded at the master's level should not apply toward the 45+ undergraduate limit. To address this reporting issue, the definition of Item #21 on the CBM001 is being qualified to read "SCH – UG Load NOT State Funded". The MA level credit hours of the seniors eligible to earn Master SCH and who are affected by the 45+ undergraduate limit will be included in this item. Therefore, such sch will be excluded from the undergraduate sch comparison between the CBM001 and CBM004 of students who are affected by the undergraduate limit. There is not a change to the CBM004 report since these students will continue to be classified in the masters' enrollment category.

Students in a PharmD program are considered first-professional students rather than undergraduates, so their credit hours are not subjected to the 45+ undergraduate limit.

The phrases that are bolded reflect the changes to the CBM001 on page 1.8 of the reporting manual:

Item #21 **SCH – UG Load NOT State Funded**. Enter the number of attempted semester credit hours for which the **undergraduate** student is registered that do not qualify for **undergraduate** state funding during the current semester. **The title of this Item specifies that only the undergraduate sch will be non-funded. The MA sch of the seniors recorded in this item are fundable.** Exclude SCH attempted in courses that are state funded (Item #24), all developmental courses (Items #22 and #25), and all inter-institutional courses (Items #15 and #23). Examples are attempted SCHs of an undergraduate student who has exceeded the state limit, SCH of a student in physical education courses that are not allowed for state funding (see discussion on SCH that exceed state limits in Introduction of CBM004), and SCHs of a student in military science and religion courses. **The credit hours of the senior students who are affected by the 45+ undergraduate limit and who are within 12 sch of their first baccalaureate when enrolled in master's level courses for master's level credit will be included in this item. Such hours do not count toward the undergraduate limit. By including such hours in Item #21, instead of Item #24, the undergraduate sch comparison of students who are affected by the undergraduate limit should balance between the CBM001 and CBM004. Since the students are classified as seniors, the undergraduate sch on the CBM001 should be in balance (Items 10A + 10B = Items 15 + 21 + 22 + 23 + 24 + 25).**



Texas Higher Education COORDINATING BOARD

DIVISION OF PLANNING AND INFORMATION RESOURCES
P. O. Box 12788 Austin, Texas 78711 • 1200 East Anderson Lane 78752

David W. Gardner, Ph.D.
Assistant Commissioner
Planning and Information
Resources
512/ 427-6146
gardnerdd@thehb.state.tx.us
FAX: 512/ 427-6127

August 22, 2002

MEMO

Susan E. Brown
Director
Planning
512/ 427-6153
brownsn@thehb.state.tx.us
FAX: 512/ 427-6127

To: University Reporting Officials and Institutional Researchers

From: Kenneth Dalley

John R. Cox
Director
Information Resources
512/ 427-6300
coxjn@thehb.state.tx.us
FAX: 512/ 427-6447

Subject: September 1999 Reporting Manual revision 8
Report changes for CBM001
Reporting Due date for the CBM001 and CBM004 for Appropriation Process

Casey M. Kennedy
Director
Web Services
512/ 427-6288
kennedycy@thehb.state.tx.us
FAX: 512/ 427-6447

As of August 22, 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 #35, has been rescinded. 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.) The definition of students enrolled in Dual Credit Courses, Item #31, has changed. The first sentence now reads, "Enter the number of dual credit hours attempted in which the student receives both high school and college credit." This is to be consistent with CB Rule 5.262.

Around September 15th the instructions for reporting pharmacy courses on the CBM004 should be revised. Look for them to be posted to the web shortly thereafter.

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

P.O. Box 12788 Austin, Texas 78711

Pamela P. Willeford
CHAIR
Martin Basaldua, M.D.
VICE CHAIR
Raul B. Fernandez
SECRETARY OF THE BOARD

MEMORANDUM

July 24, 2002

Neal W. Adams
Ricardo G. Cigarroa, M.D.
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Robert W. Shepard
Windy Sitton
Terdema L. Ussery II

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

512/ 427-6101
Fax 512/ 427-6127

Web site:
<http://www.thecb.state.tx.us>

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

David W. Gardner, Ph.D.
Assistant Commissioner
Planning and Information Resources
512/ 427-6146
gardnerdd@thecb.state.tx.us
FAX: 512/ 427-6127

May 1, 2002

MEMO

Susan E. Brown
Director
Planning
512/ 427-6153
brownnsn@thecb.state.tx.us
FAX: 512/ 427-6127

To: University Reporting Officials and Institutional Researchers

From: Kenneth Dalley

John R. Cox
Director
Information Resources
512/ 427-6300
coxjn@thecb.state.tx.us
FAX: 512/ 427-6447

Subject: September 1999 Reporting Manual revision 7
Student report changes for "Non-Disclosure" of directory information

Casey M. Kennedy
Director
Web Services
512/ 427-6288
kennedycy@thecb.state.tx.us
FAX: 512/ 427-6447

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

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 #34, Non-Disclosure, and Item #35, SCH Release, are the new items added to the CBM001 on page 1.10. The Data Processing Record Layout on page 1.11, the Edit Summary report on page 1.17, the questionable/error values on page 1.20 now reflect the new items. The item number of the update code has changed to #36. The changes are effective with data due October 2002.

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. Changes effective with data due February 2003.

Item #12, Non-Disclosure, has been added to the CBM009 on page 9.2. The Data Processing Record Layout on page 9.3, the Summary of Degrees on page 9.4, the Edit Summary report on page 9.6, and the questionable/error values on page 9.8 now reflect the new item. The update code is now Item #13. The changes are effective with data due November 2002.

In the introduction part of the Class report (CBM004) that discusses "Inter-institutional Courses", the subparagraph e under paragraph 2 on page 4.4 should read "...Item #21 is coded '0' for the receiving institution". In the "Error Value" column on page 4.21, Item #10 now reads "Non-numeric value or blank". The "Off-Campus credit hours" edit summary that is produced each edit cycle now computes the off-campus summary using Location codes 1, 3, 4, 6, 8, 9, and B and not just code 1.

The third sentence of the first paragraph in the discussion about the faculty report (CBM008) should read "Instructional faculty on sabbatical leave should be reported with "000" percent time but at their regular salaries, ...". The underlined phrase has been added on page 8.1.

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

DIVISION OF PLANNING AND INFORMATION RESOURCES
P. O. Box 12788 Austin, Texas 78711 • 1200 East Anderson Lane 78752

David W. Gardner, Ph.D.
Assistant Commissioner
Planning and Information Resources
512/ 427-6146
gardnerdd@thehb.state.tx.us
FAX: 512/ 427-6127

September 27, 2001

MEMO

Susan E. Brown
Director
Planning
512/ 427-6153
brownnsn@thehb.state.tx.us
FAX: 512/ 427-6127

To: University Reporting Officials and Institutional Researchers

From: Kenneth Dalley

Subject: September 1999 Reporting Manual revision 6 (TASP changes)

John R. Cox
Director
Information Resources
512/ 427-6300
coxjn@thehb.state.tx.us
FAX: 512/ 427-6447

Casey M. Kennedy
Director
Web Services
512/ 427-6288
kennedycy@thehb.state.tx.us
FAX: 512/ 427-6447

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

DIVISION OF PLANNING AND INFORMATION RESOURCES
P. O. Box 12788 Austin, Texas 78711 • 1200 East Anderson Lane 78752

David W. Gardner, Ph.D.
Assistant Commissioner
Planning and Information Resources
512/ 427-6146
gardnerdd@thehb.state.tx.us
FAX: 512/ 427-6127

September 18, 2001

MEMO

Susan E. Brown
Director
Planning
512/ 427-6153
brownsn@thehb.state.tx.us
FAX: 512/ 427-6127

To: University Reporting Officials and Institutional Researchers
From: Kenneth Dalley
Subject: September 1999 Reporting Manual revision 5 (clarifications)

John R. Cox
Director
Information Resources
512/ 427-6300
coxjn@thehb.state.tx.us
FAX: 512/ 427-6447

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

Casey M. Kennedy
Director
Web Services
512/ 427-6288
kennedyyc@thehb.state.tx.us
FAX: 512/ 427-6447

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 1.5, and Item #12, Ethnic Origin, on page 1.6 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 #12, Ethnic Origin, has been expanded to clarify how these international students should be coded.

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 #12:

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.



Texas Higher Education COORDINATING BOARD

DIVISION OF PLANNING AND INFORMATION RESOURCES
P. O. Box 12788 Austin, Texas 78711 • 1200 East Anderson Lane 78752

David W. Gardner, Ph.D.
Assistant Commissioner
Planning and Information Resources
512/ 427-6146
gardnerdd@thehb.state.tx.us
FAX: 512/ 427-6127

July 11, 2001

Susan E. Brown
Director
Planning
512/ 427-6153
brownsn@thehb.state.tx.us
FAX: 512/ 427-6127

MEMO

John R. Cox
Director
Information Resources
512/ 427-6300
coxjn@thehb.state.tx.us
FAX: 512/ 427-6447

To: University Reporting Officials and
Institutional Researcher
From: Kenneth Dalley
Subject: Fall 1999 Reporting Manual revision 4

Casey M. Kennedy
Director
Web Services
512/ 427-6288
kennedycy@thehb.state.tx.us
FAX: 512/ 427-6447

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

1. When reviewing students reported on the CBM001 in dual credit programs, many of the high school students are being reported as first time. These students should not be reported as first-time entering college (Item #9 on the CBM001) until they have completed their high school work. The reporting manual indicates to "include as first-time students those who entered with advanced standing (college credits earned before graduation from high school)."
2. 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."
3. In item #12, 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."
4. A new Item #32, Teacher Education Program, has been created to identify students who are admitted to or continuing their enrollment in a teacher education program. Enter a code of '01', else leave it blank.
5. This is a reminder that the "SCH of an undergraduate degree program" (Item #26) must be reported for all seniors beginning this fall.
6. A couple of qualifications have been made to the application report (CBM00B) in Item #14, "Admission Action or Acceptance Status". Any student who has been identified by the graduating high school as being in the top 10% should be reported in category 01, not just the students who were accepted based on the top 10% criteria. Also include in the 01 category, a student who graduated in the top 10% even if the acceptance was based on the student being in the top 25% of his graduating class.
7. In Item #13, "Entering Status", do not include students in category 01 (No previous college work) until the first term after they have completed their high school work.

CORRECTION: HB 1304 should read HB 1403



Texas Higher Education COORDINATING BOARD

DIVISION OF PLANNING AND INFORMATION RESOURCES
P. O. Box 12788 Austin, Texas 78711 • 1200 East Anderson Lane 78752

David W. Gardner, Ph.D.
Assistant Commissioner
Planning and Information Resources
512/ 427-6146
gardnerdd@thecb.state.tx.us
FAX: 512/ 427-6127

August 11, 2000

Susan E. Brown
Director
Planning
512/ 427-6153
brownsn@thecb.state.tx.us
FAX: 512/ 427-6127

MEMO

John R. Cox
Director
Information Resources
512/ 427-6300
coxjn@thecb.state.tx.us
FAX: 512/ 427-6447

To: University Reporting Officials and
Institutional Researchers

From: Kenneth Dalley

Casey M. Kennedy
Director
Web Services
512/ 427-6288
kennedycy@thecb.state.tx.us
FAX: 512/ 427-6447

Subject: Fall 1999 Reporting Manual revision 3
CBM005 change effective Fall 2000

The Campus Planning Division of the Coordinating Board is requiring a change to the Building and Room Utilization report (CBM005) effective with the Fall 2000 cycle. Current data fields are not affected. The general information instructions have changed to identify the classes that are to be reported. Since Room utilization is based on average weekly hours of use, all courses under the jurisdiction or control of the institution's governing board are to be considered in these calculations regardless of where the room is physically located.



Texas Higher Education COORDINATING BOARD

DIVISION OF PLANNING AND INFORMATION RESOURCES
P. O. Box 12788 Austin, Texas 78711 • 1200 East Anderson Lane 78752

David W. Gardner, Ph.D.
Assistant Commissioner
Planning and Information Resources
512/ 427-6146
gardnerdd@thehb.state.tx.us
FAX: 512/ 427-6127

June 9, 2000

Susan E. Brown
Director
Planning
512/ 427-6153
brownsn@thehb.state.tx.us
FAX: 512/ 427-6127

MEMO

John R. Cox
Director
Information Resources
512/ 427-6300
coxjn@thehb.state.tx.us
FAX: 512/ 427-6447

To: Chief Reporting Official and Institutional Researcher (U)

From: Kenneth Dalley

Subject: Fall 1999 Reporting Manual revision 2

Casey M. Kennedy
Director
Web Services
512/ 427-6288
kennedycy@thehb.state.tx.us
FAX: 512/ 427-6447

A new item, semester credit hours of students enrolled in dual credit courses, has been identified and approved by our board and data committee to be collected effective Fall 2000. The CB rules on Dual Credit Partnerships between secondary schools and Texas public universities can be found in Chapter 5 subchapter M. They were approved at the January 2000 Board meeting.



Texas Higher Education COORDINATING BOARD

DIVISION OF PLANNING AND INFORMATION RESOURCES
P. O. Box 12788 Austin, Texas 78711 • 1200 East Anderson Lane 78752

David W. Gardner, Ph.D.
Assistant Commissioner
Planning and Information Resources
512/ 427-6146
gardnerdd@thehb.state.tx.us
FAX: 512/ 427-6127

December 14, 1999

Susan E. Brown
Director
Planning
512/ 427-6153
brownsn@thehb.state.tx.us
FAX: 512/ 427-6127

MEMO

John R. Cox
Director
Information Resources
512/ 427-6300
coxjn@thehb.state.tx.us
FAX: 512/ 427-6447

To: Chief Reporting Official and Institutional Researcher (U)
From: Kenneth Dalley
Subject: Fall 1999 CBM Reporting Clarifications
Fall 1999 Reporting Manual revision 1

Casey M. Kennedy
Director
Web Services
512/ 427-6288
kennedycy@thehb.state.tx.us
FAX: 512/ 427-6447

In our preliminary editing of the Fall 1999 CBM001 report it came to our attention that data in Items #21, #22, #24, and #25 were not being reported the same way by all institutions. We did a straw poll and, from the responses that we received, there was nearly a 3-to-1 majority of institutions who were reporting zeros in all of these Items. The reporting instructions on page 1.2 indicate that for "undergraduate" students, Items #10A and #10B should equal the sum of Items #15, #21, #22, #23, #24, and #25. All institutions will be expected to report all zeros in Items #21, #22, #24, and #25 for post-baccalaureate and graduate students. Also, Items #15 and #23 are to be completed if they apply to undergraduate as well as graduate students.

New TASP rules were approved at the October CB meeting. One of the changes relates to transfer students from a private or out-of-state institution. The reporting instructions for TASP (CBM002) indicate that a student must transfer 60 or more hours before they are eligible to satisfy the TASP requirements by using a transferred course in which they had earned a B or better in any or all of the three skill areas. The "60 or more hours" clause has been deleted from the requirement. The rules now only indicate "A student who transfers ...". Item #18 code 0 should now read "Not qualified for TASP exemption or did not have a transfer grade of B or better in all three skill areas". In Item #18 code 7 change the definition to read, "Satisfied TASP requirement based on qualifying as a transfer student from an out-of-state or private institution with a "B" or higher grade in an appropriate course in all three skill areas."