Texas Education Agency

Texas Records Exchange (TREx) System Training

for

Education Service Centers

July 31, 2007

Project Background

▸ About TREx

The Texas Records Exchange (TREx) system is a web-based software application designed for the exchange of electronic student records as mandated by the 79th Legislature, 3rd Called Session, 2006 (House Bill 1).

TREx Purpose

- School registrars can electronically request and receive student records for students who have attended or will be attending Texas public schools.

- High school registrars can electronically create and send official student transcripts to Texas public colleges and universities using TREx to access the University of Texas (UT) SPEEDE server.

Objectives

- Provide quick and cost-effective method for sending and receiving student records and transcripts

- Facilitates response within 10 day required time frame

- TEASE log-in and electronic encryption of data protects student information (data only transferred via TREx – it is housed at district/school site)

- Minimal software and hardware requirements

TREx Project Status

TREx Implementation Status

- Implementation
  - Using T^3 (Train-the-Trainer) model
  - TEA providing resources for ESCs, Districts and Schools

- Phased Implementation Approach

- TREx User Roles

Phase 2 Functionality

▸ District level login

▸ State and service center login

▸ Manual Data Entry

▸ Email notification for aged items

▸ Modifications to validation: State minimum and TEA recommended

Timeline

Project Event	Expected Date
TEA Training for ESCs (Train-the-Trainer)	07/31/2007
TEASE Automated Online Registration Begins	08/01/2007
TREx Phase 1 System Available	09/04/2007
TREx Phase 2 System Available	10/29/2007
Vendor Deadline for Development of XML Extract for SIS	11/30/2007 (tentative)
District/Campus Requirement for Use of TREx Transfer Process	05/19/2008

TREx Session Overview

Session Agenda

- TREx Overview

- Accessing TREx through TEA SE

- TREx Functionality & ESC Hands-On Training

- Resources available for Train-the-Trainer

- Data Standards, File Naming Conventions, and Q & A

- ESC Training Needs Survey & Training Evaluation

TEA SE Login and Demonstration

TEA SE Login and Demonstration

Go to live site...

Establishing a TEA SE Account

- Complete TEA SE Online Account Request

- Submit Online Request August 1, 2007

- Local Setup Process

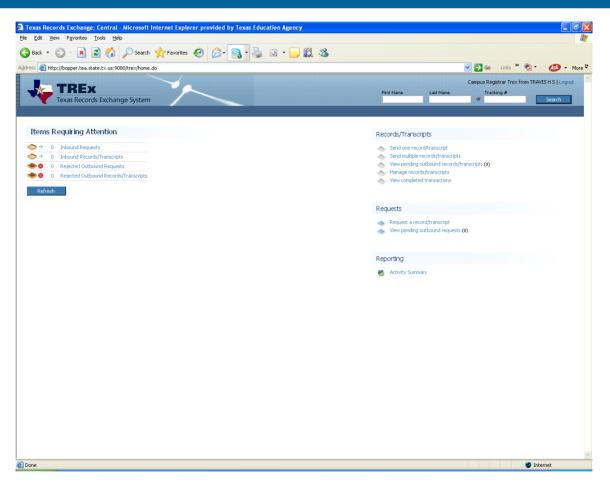# TREx System Training

Six Primary Functions

How to…

1. Look up a student
2. Request a record/transcript
3. Track a transaction
4. Send a record/transcript
5. Receive a record/transcript
6. Upload and manage data files

TREx Demonstration

Go to live site…

Hands-On Training Objectives

1. Login to TEA SE to access TREx

2. Search PID for student and recent enrollment

3. Select student and recent enrollment and request records from Exiting school and log out

4. Login as the Exiting registrar

5. View pending outbound requests for outstanding requests

6. Choose to fulfill, hold, or reject the request, chose submit and log out

7. Log in as the original requesting registrar, view inbound requests

Five TREx scenarios:

1. Fulfill

2. Reject

3. Hold

4. Send a record without validation errors

5. Send a record with validation errors

LUNCH BREAK

Hands-On Training Con't…

Enhanced Functionality

1. Approval

TREx enables registrars and other authorized users to send "approved" student records between K–12 institutions. TREx also allows high schools to send "official" transcripts to higher education institutions.
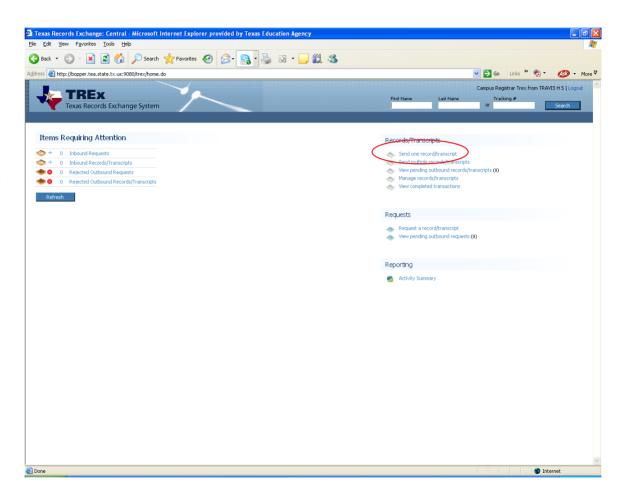
2. Data Validation

Registrars and technical users can check the validity and conformance of their records/transcripts being uploaded with respect to the XML schema, context edits, state minimums and TEA recommended data elements.
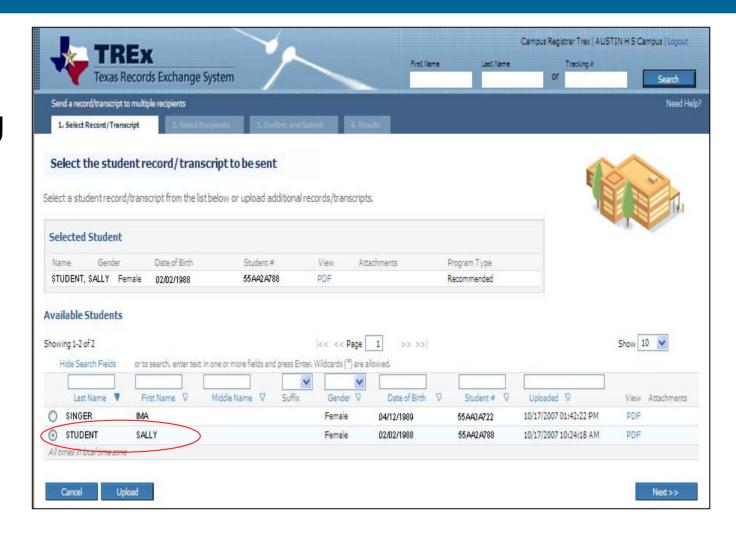
3. Manual Data Entry

Registrars can manually enter student record and transcript data directly into TREx, allowing districts without automated extracts to still have full functionality of TREx. TREx validates this data the same way of the uploaded data.
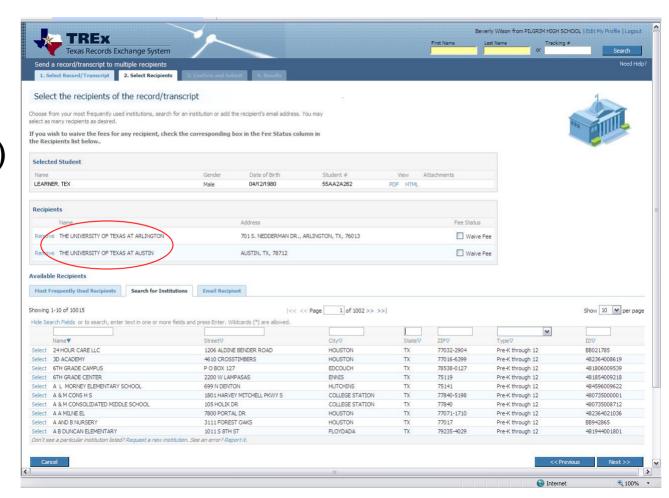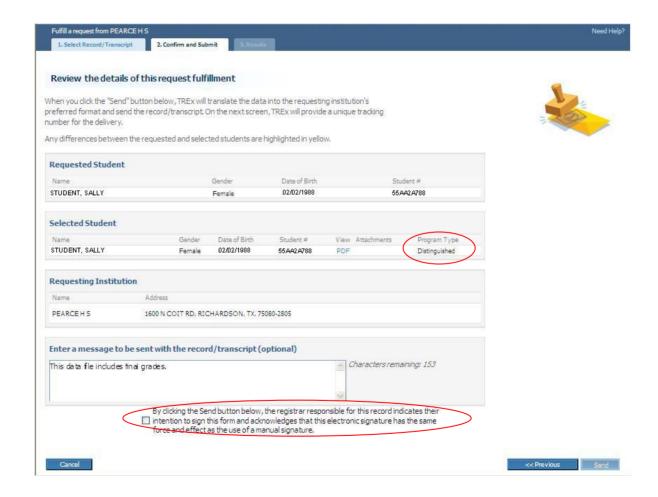
TREx Approval

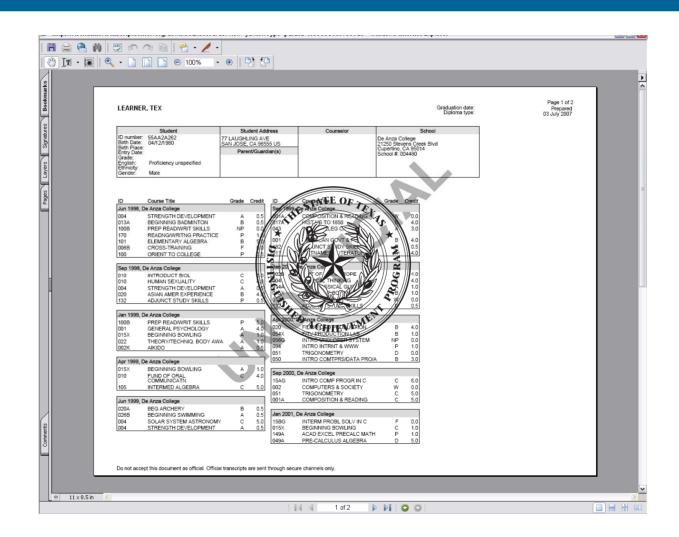Select the
*Send single
student* link

TREx Approval

Selecting the student

TREx Approval

Select Recipient(s)

TREx Approval

Review delivery details

TREx Approval

Unofficial Transcript Seal before Sending

26

TREx Approval

Successful
Delivery

TREx Approval

Delivery details

TREx Approval

Seal on Transcript After Receiving

Manual Data Entry

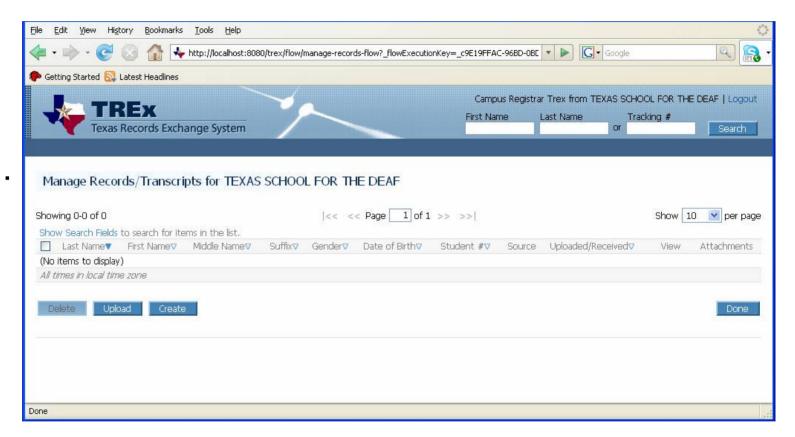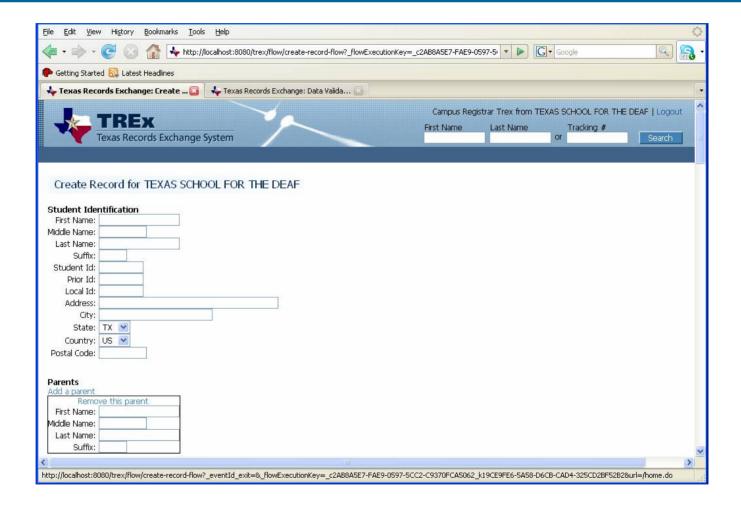Getting started…

Disclaimer: TREx under development, minor modifications may occur pending final release.
Prepared for Education Service Center TREx Training Day, July 31, 2007
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Manual Data Entry

Student and Parent Data

Appendix A – Data Element Lists

Because TREx uses a single XML extract file schema whether the record being transferred as a student record or a high school transcript, many data elements are shown as "Not Required" with the goal of reducing the risk of a high number of failures when extracting student records. Those data elements required by the TREx schema include the following:
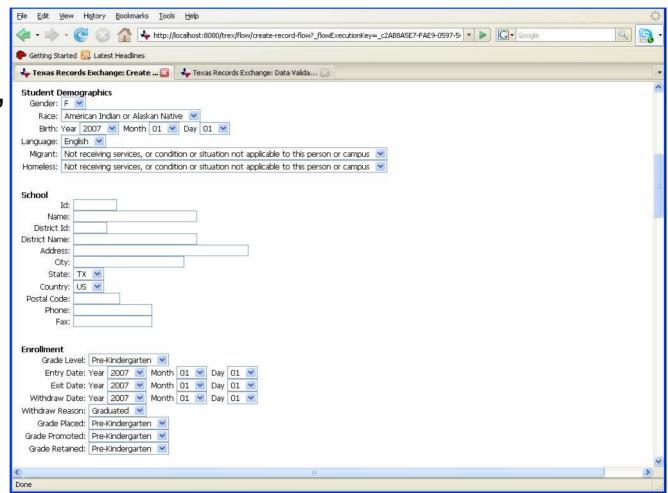
Data Element Common Name	XML Name
Student ID	StudentID
First Name	FirstName
Last Name	LastName
Gender Code	Gender
Ethnicity Code	Race
Date of Birth	BirthDate
District ID	DistrictID
Campus ID	SchoolID
Campus Name	SchoolName
Campus Phone	PhoneNumber
Academic Year	SchoolYear
Grade Level (Current)	GradeLevel

The following section is a list of the TREx data elements arranged by the record type (as they would appear in a record; not within a complex type). The table indicates a data element as required in the following manner:
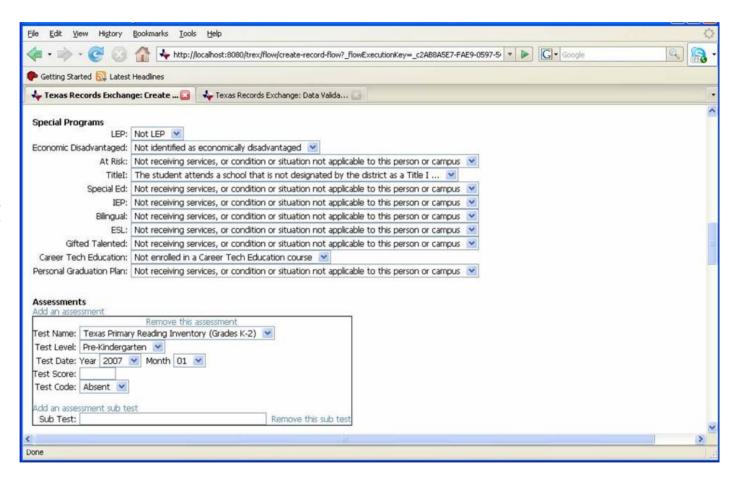
- Schema Required: required within the file extract by the TREx schema
- State Required Minimum: required by state law and/or Texas Education Code
- State Required Recommended: recommended by TEA, institutions of higher education, and user focus groups

If a data element is shown as not required for the file extract but data are available and relevant to the accuracy and completeness of the student record or transcript, it is the responsibility of the campus/district to include these data.
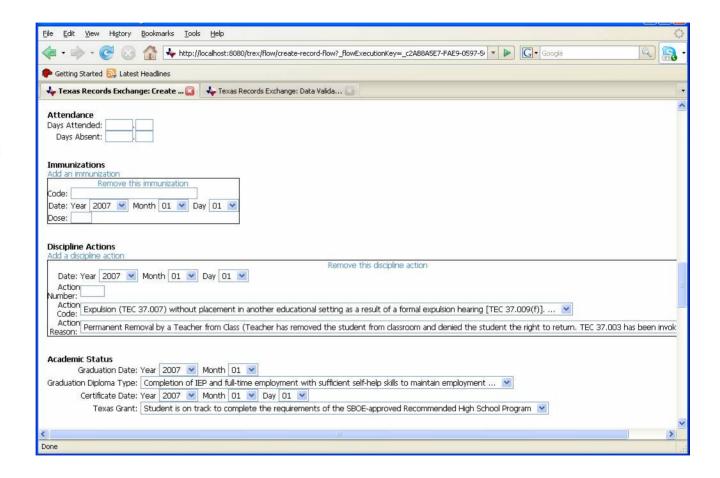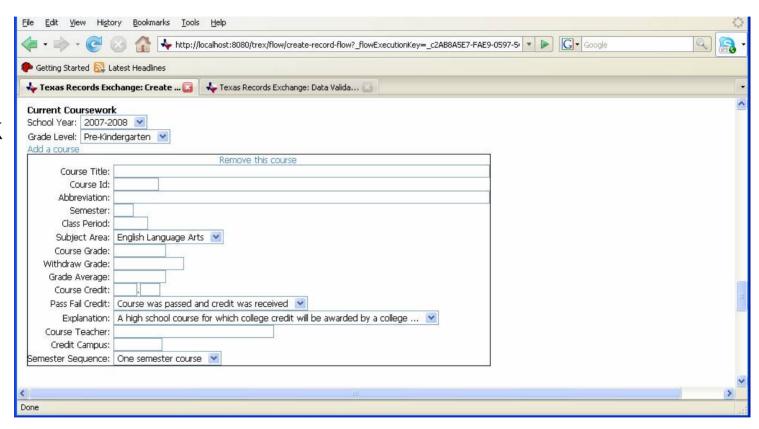
Manual Data Entry

Student Demographics, School and Enrollment Data

Manual Data Entry

Special Programs and Assessment Data

Manual Data Entry

Attendance, Immunization, and Academic Status

Manual Data Entry

Current Coursework Data

Manual Data Entry

Academic Status and Academic Summary

Extract-Import Functions

In addition to the TREx manual data entry, schools can also generate a student data/transcript file extract from their local student information system (SIS) following the TEA Data Standards specification document.

Extract-Import Functions

Each SIS may implement the electronic process for generating the record and transcript extract file.

One example of this extraction process is RSCCC

Begin demonstration…

ESC Resources for District/School Training

TREx Support Resources

▸ Go to TEA project website at:

http://www.tea.state.tx.us/trex/

- ◦ User guide
- ◦ Embedded online help
- ◦ Webinars
- ◦ On-line tutorials for key activities
- ◦ Job-aids
- ◦ FAQs

TREx Support Resources

Customer Service Requests for ESCs

- Email trextech@tea.state.tx.us

- Voice-mail box

- Identify content for additional Job-aids, FAQs, and TREx input

TREx Data Standards and File Naming Conventions

TREx Questions and Answers

Closing Comments and Training Evaluation