

**60x30TX**



**Texas Higher Education Coordinating Board**

# **End-of-Year Data Record Reader Instruction Manual**

Financial Aid Services  
Texas Higher Education  
Coordinating Board

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# End-of-Year (EOY) Data Record Reader

## Instruction Manual

### Purpose

The **EOY Data Record Reader** (a Microsoft Excel workbook) was created to assist institutions with the analysis of both Summer Update and EOY files.

### End-of-Year File Deadlines

- June 15, 2017 - Top 10%
- July 6, 2017 - TEG, TEOG and TEXAS Grant (4-Year Public Universities and HRIs)
- July 20, 2017 - TEXAS Grant (Community Colleges, Lamars, and TSTCs)

### Format

There are eight color-coded worksheets/tabs in the **EOY Data Record Reader**. The names of each tab identify which worksheet should be used to analyze the records for a specific program.

#### Example:



The top row in each worksheet contains column names that align with the data elements in the file.

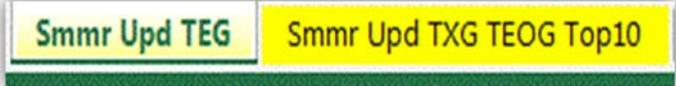
#### Example:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Field #1	Field #2	Field #3	Field #4	Field #5	Field #6	Field #7	Field #8	Field #9	Field #10	Field #11	Field #12	Field #13	Field #14
	Recipients's ID	Is ID a SSN? Y = Yes N = No	DOB	Last Name	First Name	Meeting SAP? Y = Yes N = No	GPA	Completion Rate	SCH Completed	FICE	EOY Reporting Year	Type of Award	Degree-Type being Pursued	Person Validated
2														

## Analyzing Summer Update Records

Summer Update files are submitted in a tab-delimited text file format. Tab-delimited records can be copied directly from the file into a **Smmr Upd** worksheet in the **Data Record Reader** and reviewed. Due to varying data elements, there are two different worksheets used to read Summer Update files:

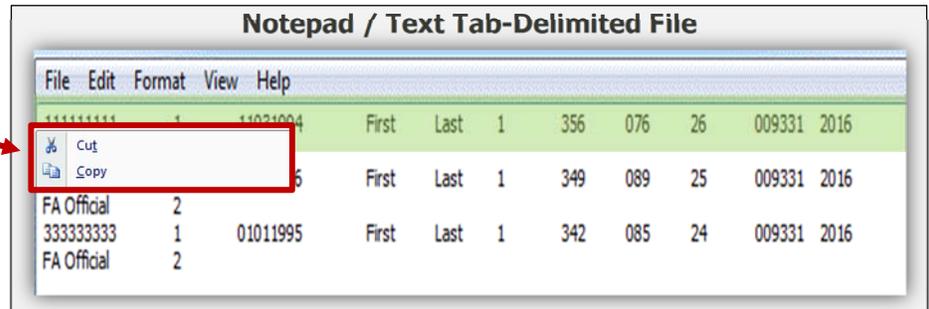
- Smmr Upd TEG (14 data elements)
- Smmr Upd TXG TEOG Top10 (13 data elements)



### Summer Update File Process

To analyze Summer Update records:

1. Open the applicable Summer Update file in Notepad and **copy** the records.
2. **Paste** the data into the appropriate worksheet on the first available empty cell in Column A. Select **Keep Text-Only**. Each data element will appear in a separate column on the worksheet to review.



	A	B	C	D	E	F	G	H	I	J	K	L	M
	Field #1	Field #2	Field #3	Field #4	Field #5	Field #6	Field #7	Field #8	Field #9	Field #10	Field #11	Field #12	Field #13
1	Recipients's ID			Last Name	First Name	Meeting SAP? 1 = Yes 2 = No	GPA	FILLER (Must enter "100")	SCH Completed	FICE	EOY Reporting Year	Person Validated	Type of Award
2	111111111			Last		1	356	76	26	009331	2016	FA Official	2
3	222222222	1	8271996	First	Last	1	349	89	25	9331	2016	FA Official	2
4	333333333	1	1011995	First	Last	1	342	85	24	9331	2016	FA Official	2
5													
6													

### Correcting Summer Update Files

To correct errors identified using the **EOY Data Record Reader**, institutions have two options:

1. Manually correct the errors in the original Notepad/Text Tab-Delimited file.
2. Make corrections in the **EOY Data Record Reader** excel worksheet. Copy the records from excel and paste the updated records to replace the information in the original Notepad/Text Tab-Delimited file.
  - Changes in the file will **not** automatically update the **Header** or **Trailer** records. Changes must be made manually to the header and trailer in the Notepad/Text Tab-Delimited file.

Once updates are made, the file can be resubmitted for processing.

## Analyzing TEXAS Grant and TEOG EOY Records

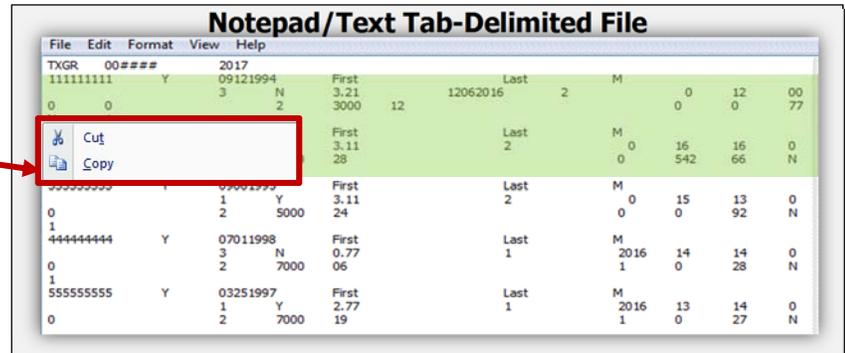
TEXAS Grant and TEOG EOY files are both submitted in a tab-delimited text file format. Tab-delimited records can be copied directly from the file into an **EOY Records** worksheet in the **Data Record Reader** and reviewed. Due to varying data elements, there are two different worksheets used to read TEXAS Grant and TEOG EOY files:

- TXG EOY Records (38 data elements)
- TEOG EOY Records (36 data elements)



### TEXAS Grant and TEOG File Process

1. Open the applicable EOY file in Notepad and **copy** the records.
2. **Paste** the data into the appropriate worksheet on the first available empty cell in Column A. Select **Keep Text-Only**. Each data element will appear in a separate column on the worksheet to review.



Field #1	Field #2	Field #3	Field #4	Field #5	Field #6	Field #13	Field #14	Field #15	Field #16	Field #17	Field #18	Field #19	Field #20	Field #21
Recipient ID Number	Recipient's ID Number	Recipient's ID Number	Recipient's Last Name	Recipient's First Name	Recipient's Middle Initial	Select Service Reg.	Met SAP?	Recipient's Cumulative GPA	Filler (Must be blank)	Date Received Bachelor's Degree (MMDDYYYY)	Award Type	Filler (Must be blank)	Calendar Year of Award	Fall Hours Attempted
111111111	Y	9121994	First	Last		3	N	3.21		12062016	2		0	12
222222222	Y	5281997	First	Last		3	Y	3.11			2		0	16
333333333	Y	9061995	First	Last		1	Y	3.11			2		0	15
444444444	Y	7011998	First	Last		3	N	0.77			1		2016	14
555555555	Y	3251997	First	Last		1	Y	2.77			1		2016	13

### Correcting TEXAS Grant and TEOG Files

To correct errors identified using the **EOY Data Record Reader**, institutions have two options:

1. Manually correct the errors in the original Notepad/Text Tab-Delimited file.
2. Make corrections in the **EOY Data Record Reader** excel worksheet. Copy the records from excel and paste the updated records to replace the information in the original Notepad/Text Tab-Delimited file.
  - Changes in the file will **not** automatically update the **Header** or **Trailer** records. Changes must be made manually to the header and trailer in the Notepad/Text Tab-Delimited file.

Once updates are made, the file can be resubmitted for processing.

## Analyzing TEG and Top 10% EOY Records

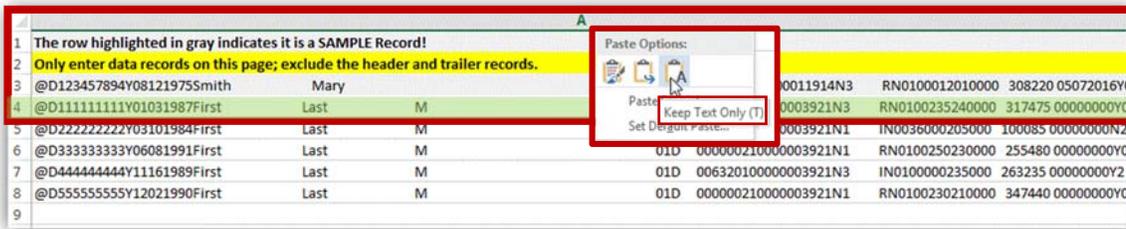
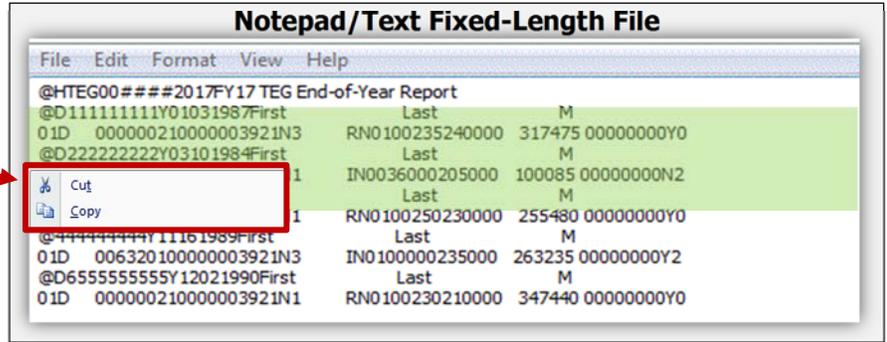
TEG and Top 10% EOY files are both submitted in a fixed-length text format. Fixed-length files cannot be copied directly into the **EOY Records** worksheet. Records must first be copied into the **TEG** or **Top10 Data** worksheet. The data will be transferred automatically into the **EOY Records** worksheet to be reviewed. Four different worksheets are used to read TEG files and Top 10% EOY files:

- TEG Data (Paste records)
- TEG EOY Records (Review 37 data elements)
- Top10 Data (Paste records)
- Top10 EOY Records (Review 19 data elements)



### TEG and Top 10% File Process:

1. Open the applicable EOY file in Notepad and **copy** the records
2. **Paste** the data into the appropriate **Data** worksheet on the first available empty cell in Column A. Select **Keep Text-Only**. All data elements will appear in Column A on the worksheet.



3. Open **TEG Records** or **Top10 Records** worksheet to view and analyze the data.

DETAIL RECORD(S)													
Field #1	Field #2	Field #3	Field #4	Field #5	Field #6	Field #14	Field #15	Field #16	Field #17	Field #18	Field #19	Field #20	Field #21
Record Code (Must be "@D")	Recipient ID Number	Is the "ID Number" a SSN? Y = Yes N = No	Recipient's DOB (MMDDYYYY)	Recipient's Last Name	Recipient's First Name	Recipient's Residency 1 = TX Resident 2 = NMSF	Degree-Type Being Pursued A = Associate's B = Baccalaureate C = Master's D = Doctoral E = Professional	Filler (Must enter 5 blank spaces)	Recipient's EFC	Recipient's TEG Award Amount	Recipient's Tuition Differential	Athletic Scholarship? Y = Yes N = No	Select Service Reg. 1 = Yes 2 = No 3 = Exempt
@D	123457894	Y	08121975	Smith	Mary	1	C		000000	336400	011914	N	3
@D	111111111	Y	01031987	First	Last	0	1	D	000000	021000	000392	1	N
@D	222222222	Y	03101984	First	Last	0	1	D	000000	010000	000392	1	N
@D	333333333	Y	06081991	First	Last	0	1	D	000000	021000	000392	1	N
@D	444444444	Y	11161989	First	Last	0	1	D	006320	010000	000392	1	N
@D	555555555	Y	12021990	First	Last	0	1	D	000000	021000	000392	1	N

### Correcting TEG and Top 10% Files

To correct errors identified using the **EOY Data Record Reader**, institutions only have one option:

1. Manually correct the errors in the original **Notepad/Text Fixed-Length** file.
  - Corrections cannot be made on the **TEG Records** or **Top10 Records** excel worksheets. The worksheets in the **EOY Data Record Reader** are only used to view data, and identify errors.

Once updates are made, the file can be resubmitted for processing.

## CONTACT FINANCIAL AID SERVICES

By phone: (844)-792-2640

By email: [CONTACT US](#).

### Contact Reason - Exemptions/Waiver Programs

- All state exemption and waiver programs including EAE

### Contact Reason - Student Loan- School Info Request

- CAL
- BOT
- TASSP

### Contact Reason - State and Federal Grants and Scholarships

- TEXAS Grant
- TEOG
- TEG
- Top 10%

### Contact Reason - Work-Study Programs

- TCWS
- TCWS Mentorship

[Student Financial Aid Programs Information Website](#)

## INSTRUCTIONS MANUALS

[TEXAS Grant FY 2017 End-of-Year Report Instructions](#)

[TEXAS Grant FY 2016 Summer Update File Instructions](#)

[TEOG FY 2017 End-of-Year Report Instructions](#)

[TEOG FY 2016 Summer Update File Instructions](#)

[TEG FY 2017 End-of-Year Report Instructions](#)

[TEG FY 2016 Summer Update File Instructions](#)

[Top 10% Scholarship FY 2017 End-of-Year Report Instructions](#)

[Top 10% FY 2016 Summer Update File Instructions](#)

## AVAILABLE FORMS

TEXAS Grant, TEOG, TEG, Top 10% Scholarship,

[Return of Funds Form](#)

## CALENDAR

[Institutional Calendar](#)