

ApplyTexas IHE Briefing

July 10, 2024

Welcome

Today's Agenda

Welcome

Deployment Overview

Upcoming Training Schedule

Reminders

Q&A

Deployment Overview

Deployment Overview 7/11

This week's deployment window will be from 7-11:59 p.m. CST on Thursday 7/11. A maintenance banner will be displayed to inform users of the downtime. This week's deployment will focus on the following fixes:

Thursday Deployments:

• **Help Desk Links Update:**

- We are updating our help desk support system to improve service and give users better visibility into their individual ticket status.
- After this deployment, the old admin help desk dashboard and link to the current Help Desk form on Smartsheets will no longer be accessible.

Applicant Portal Enhancements:

- **Independent Student update:** When a student indicates that they are not claimed as dependent, they will no longer be asked questions about their parent/guardian
- **College History Addition:** We are adding an "I can't find my school" checkbox to the college history section. This addition will assist applicants in accurately reflecting their educational background, even when their institution is not listed.
- **Errors completing Application:** Errors completing sections of the application will be resolved for those experiencing the issues, e.g. in Core Questions.

Admin Portal Improvements:

- **CSV File Updates:** The CSV files will be updated to include additional codes with descriptions to improve data interpretation and reporting.
- **Application and Scholarship Counts Accuracy:** Updates so that application and scholarship counts are displayed accurately, facilitating better tracking and management.

Counselor Portal Updates:

- **Authorization Role Dropdown Update:** The dropdown menu for the Authorization role will now only include options for 'District Counselor' and 'Counselor.' This update aims to clarify roles and enhance portal navigation.

Previous Deployment 7/2

Our deployment late last week was successful. Below is the list of fixes that were addressed:

Applicant Portal Enhancements:

- **Address Error Resolution:** Fixed the inclusion of a U.S. state in some international addresses.
- **Application Deadline Clarity:** Addressed an issue that caused application deadlines to appear as expired on the dashboard.
- **School Search Simplification:** Removed majors from the school search to reduce confusion.
- **Multiple Applications Per Term:** Allowed the submission of more than one application per term for graduate or international graduate applications.

Admin Portal Updates:

- **Application Count Fix:** Resolved a bug that caused the application count to only show 4-year institutions.
- **EDI Fixes:** Resolved EDI issues for specific institutions.

Counselor Updates:

- **Historical Reports and Training:** Updated to include downloads for historical reports and training documents.

Training Schedule

Upcoming Trainings

Starting this Thursday, we will kick off a webinar training series on the Applicant and Admin Portal. Please plan to attend and invite anyone within your institution who has access to the Admin Portal. All sessions will be recorded and posted online.

Date and Time	Topic	Details
Thursday, July 11 3 p.m. CST	Applicant Portal management	<ul style="list-style-type: none">• Overview of the Applicant Portal• Navigation through the dashboard• Review of the application screener• Core questions• Searching for schools• School required questions• Submitting an application
Wednesday, July 17 3 p.m. CST	Admin Portal access and Configuring a semester/application	<ul style="list-style-type: none">• Overview of roles within the Admin Portal• How to set-up, modify, and remove access• Examples of access permissions (application viewers and executive updaters)• Overview of different application types• Configuring schools and majors• Setting dates, fees, essays, and school required questions• Customizing major questions for graduate programs• Adjusting display, payment, and publish settings• Managing scholarship settings
Wednesday, July 24 3 p.m. CST	Application tracking	<ul style="list-style-type: none">• Application search and exports• Monitoring application counts• Managing application transmission• Managing school and district changes• Updating contact information and other school details• Handling school codes, data, and migration requests• Integrating college scorecard data
Wednesday, July 31 3 p.m. CST	Admin Portal access and Configuring a semester/application (repeat)	<ul style="list-style-type: none">• Review Admin Portal access & Configuring a semester/application

Reminders

Quick Fix Applicant Portal Issues

Issue	Cause	Next Step / Solution
Application is showing as “Transmitted” in the admin portal or submitted in the Applicant Portal but Institution hasn’t received it	<ul style="list-style-type: none">• There may be an issue with file delivery such as delay in transmitting time	<ul style="list-style-type: none">• Gatekeepers can retransmit the application within the Admin Portal
Applicants can’t find application that should be open	<ul style="list-style-type: none">• IHE hasn’t opened this application in the Dates, Fees, Essays section of their settings	<ul style="list-style-type: none">• Configure application date in the Admin portal settings
Applicants can’t find majors for the School they are applying to	<ul style="list-style-type: none">• IHE hasn’t configured their majors from staging to live	<ul style="list-style-type: none">• Migrate existing settings from previous semesters between the staging tables.

Retransmitting Applications

To retransmit applications in the Admin Portal, you will first need to verify your access level. As a gatekeeper for your IHE, confirm that the "Transmission Settings" box is checked in your profile.

Select additional permissions user should manage *

- Authorizations
- Transmission settings
- Graduate applications settings
- Undergraduate application settings
- Payment settings

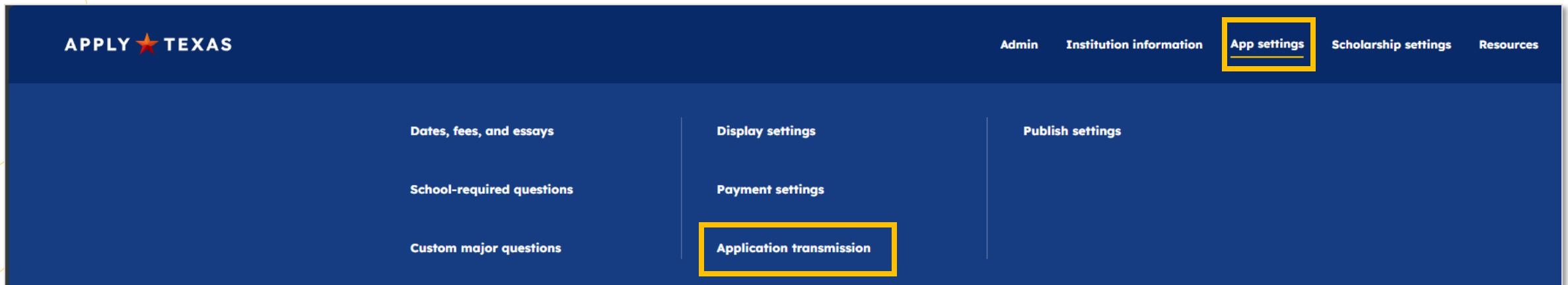
Retransmitting Applications

1. Log Into the Admin Portal:

- Access the Admin portal using your credentials.

2. Navigate to Transmission Settings:

- Click on “App settings”.
- Select “Application transmission”.



Retransmitting Applications

3. Initiate Transmission Process:

- Click on “Transmit applications now”.
- Then, click on “Regenerate Production EDI”.

4. Specify Application IDs:

- Choose “Let me enter specific application ids” from the dropdown menu.
- Enter the application ID into the provided box.

5. Add Additional IDs:

- Click “Add an id” for each additional application ID that needs to be transmitted.

6. Transmit Applications:

- Once all IDs are entered, click on “Transmit applications” to complete the process.

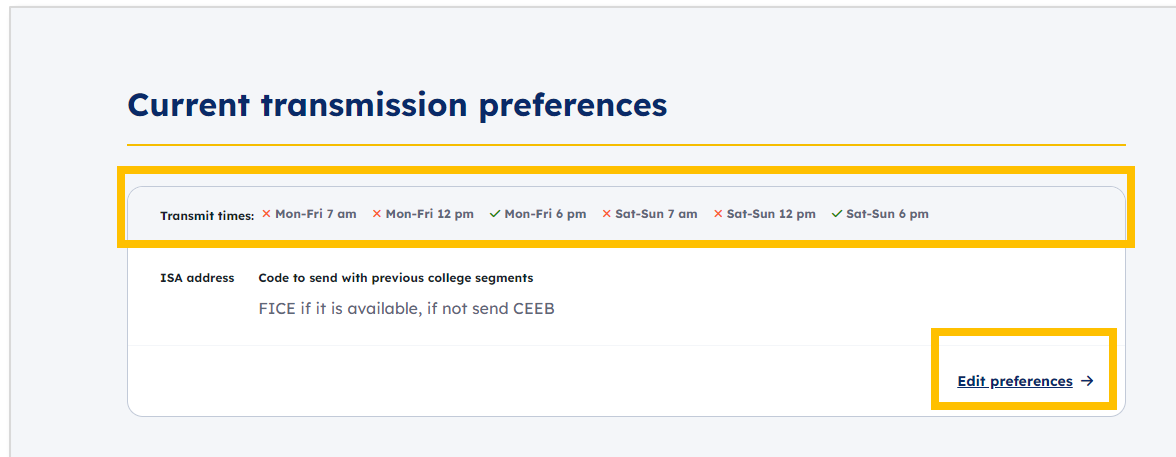
The screenshot shows a web interface for retransmitting applications. It is divided into two main sections: "Environment" and "Transmission details".

- Environment:** Contains a label "Select an environment *". There are two radio button options: "Production (Live)" and "Regenerate Production EDI". The "Regenerate Production EDI" option is selected and highlighted with a yellow box.
- Transmission details:** Contains a label "Select transmission type *". A dropdown menu is open, showing the option "Let me enter specific application ids" with a downward arrow. This dropdown is highlighted with a yellow box.
- Below the dropdown is a text input field labeled "App id *", which is also highlighted with a yellow box.
- At the bottom of the "Transmission details" section is a blue button with a white plus sign and the text "+ Add an id", highlighted with a yellow box.

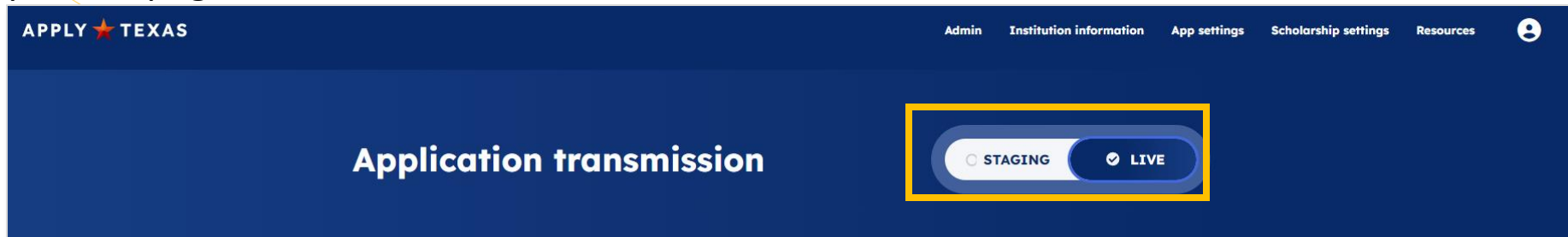
Retransmitting Applications

Things to know:

- Your IHE's transmission times are shown on the "Application Transmission" page under Current transmission preferences. You can adjust these times by clicking on "Edit preferences"



- You must ensure you are making these stages in live -> make sure the box from staging to live is checked at the top of the page.



Application Configuration

Migrating Institution and Application Configurations: Staging to Staging

To begin the **Admin Portal** configuration process for 2025-2026 semesters, you will first need to migrate existing settings from previous semesters between the staging tables. [As a reminder, for every application cycle you open, you also need to open your majors.](#)

Step 1: On the **Publish Settings** page, set the Environment to 'Staging to Staging' and input the following semesters for each of the 3 record types and select '**Publish settings**' so the data between the staging environments can be synced

- **Note:** If you did not set up data for certain 2024-2025 semesters, you can instead publish from an older cycle or start your 2025-2026 cycle configuration from scratch.

Step 2: Now you may begin updating additional application configurations in the staging environment for all the semesters listed in the 'Semester to' column (e.g., school-required questions, custom major questions, graduate essays, graduate major essays, etc.)

Semester from	Semester to
Summer I 2024	Summer I 2025
Summer 2024	Summer 2025
Summer II 2024	Summer II 2025
Fall 2024	Fall 2025
Spring 2025	Spring 2026

Migrating Institution and Application Configurations: Staging to Live

Once you have completed updating any settings, you will conduct the same activity in Publish settings as before but now between the **Staging** and **Live** environments

Step 1: Set the environment to '**staging to live**' for 13 record types and reference the semesters listed below. **(Please go in chronological order)**

Step 2: Once you validate the data looks acceptable to migrate, select '**Publish settings**'. Now your settings will be reflected in the **Applicant portal**

Semester to migrate from

Summer I 2025

Summer 2025

Summer II 2025

Fall 2025

Spring 2026

Q&A



Texas Higher Education

COORDINATING BOARD

Thanks for joining!



Appendix

- Previous webinars, resources, and announcements - [The Redesigned ApplyTexas - Texas Higher Education Coordinating Board](#)

The screenshot shows the website header with the logo on the left and navigation links on the right. The main content area is titled 'Information and Resources' and contains a list of links and announcements. The list includes instructional testing videos, administrator announcements, webinar recordings, and slide decks. It also provides information about the new ApplyTexas student portal, FAQs, and technical documentation for the system's cutover.

Texas Higher Education COORDINATING BOARD

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Information and Resources

- Instructional Testing Videos (May 20, 2024)
 - [Admin Portal Adding Additional Users](#)
 - [Admin Portal Publish Settings](#)
 - [Admin Portal Application Configurations](#)
- Assistant Commissioner Announcement: [Important: ApplyTexas Update](#) (May 10, 2024)
- Assistant Commissioner Announcement: [Important: Change in ApplyTexas Cutover Date](#) (May 3, 2024)
- Recordings of previous webinars:
 - November 15, 2023 [ApplyTexas Student Portal](#)
 - December 13, 2023 [Technical Changes Overview](#)
 - February 28, 2024 [ApplyTexas Student Portal \(reprise\)](#)
 - March 6, 2024 [Application Cutover and Technical Changes](#)
 - April 24, 2024 [Support Services and Onboarding](#)
 - May 20, 2024 [ApplyTexas Testing Kick-Off](#) (access password: w^7Qh*M)
- Slide decks of previous webinars:
 - November 15, 2023 [ApplyTexas Student Portal](#)
 - December 13, 2023 [Technical Changes Overview](#)
 - February 28, 2024 [ApplyTexas Student Portal \(reprise\)](#)
 - March 6, 2024 [Application Cutover and Technical Changes](#)
 - April 24, 2024 [Support Services and Onboarding](#)
 - May 20, 2024 [ApplyTexas Testing Kick-Off](#)
- A [slide deck](#) of the new ApplyTexas student portal for your use with prospective students applying for the 2025-2026 academic year
- Answers to questions from each webinar as an [FAQ](#)
- Assistant Commissioner Announcement: [ApplyTexas Payment Processing](#) (February 2024)
- Assistant Commissioner Announcement: [ApplyTexas Payment Processing Follow-up](#) (March 2024)
- Commissioner Memorandum: [Announcing change to fee structure for ApplyTexas](#) (March 2024)
- Technical documentation to prepare for the cutover:
 - [ApplyTexas Launch Testing Instructions](#)
 - Should you experience any issues, your technical staff may [Submit a Ticket](#) and a member of the ApplyTexas project team will respond.
 - View your designated [Testing Date and Application Type by Region](#)
 - [ApplyTexas EDI Specifications and Technical Changes](#)
 - Includes Core Question Inventory and Change Summary