

# ApplyTexas IHE Briefing

June 20, 2024

# Welcome

# Today's Agenda

Welcome

Status Update

Deployment Overview

Reminders

Application Configurations

Q&A

# Status Update

# Deployment Overview 6.20

Tonight's deployment window will be from 7-11:59 p.m. CST. A maintenance banner will be displayed to inform users of the downtime.

The primary focus of tonight's maintenance deployment is to resolve application search issues and editing date fields and school records within the admin portal, and updates related to essay deadlines and core questions within the applicant portal including:

- Address issues to retrieve apps in Saved not Submitted, Deleted, and Ready to Submit status
- Display high school information when viewing Application Details
- Correct date of birth for applicants (one day off)
- Address issues with dates displaying incorrectly (one day off)
- Hide invalid essay deadlines

**The final list of issues resolved will be shared via email tomorrow and updated on the Administrator Dashboard**

# Previous Deployments

## Prior deployments addressed:

- Missing question labels on the school custom questions with checkboxes.
- Publish Settings issues
- Issues with majors, and school-required questions in the Admin Portal
- Refined volunteer descriptions
- Issues with email notifications in the Applicant Portal

## Reminders:

- ✓ **Verify majors and school information:** Review and correct your configuration settings for the alignment of school/major settings by semester through the Admin Portal's publish features.
  - Under **Institution Information** → **Schools and majors**: make sure your schools and majors are offered for the correct application types for current and upcoming semesters in the staging and live environments
- ✓ **Applicant portal configurations:** Review configurations in the Admin Portal to ensure they are correctly displayed in the Applicant Portal.
  - Under **App Settings** → **Dates, fees, and essays**: Confirm whether each application type for a semester should be made available or not on the applicant portal
  - Under **App Settings** → **Publish Settings**: Make sure you've migrated all the schools and majors to the Live environment

# Application Configurations - Demo

# Migrating Institution and Application Configurations: Staging to Staging

**Step 1:** 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.

**Step 2:** 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 3:** 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

**Step 4:** 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 5:** Set the environment to '**staging to live**' for 13 record types and reference the semesters listed below. (Please go in chronological order)

**Step 6:** Once you validate the data looks acceptable to migrate, select '**Publish settings**'. Now your settings should be reflected in the **applicant portal**

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

# Quick Fix Applicant Portal Issues

Issue	Cause	Next Step / Solution
Don't see previous applications	<ul style="list-style-type: none"><li>Any applications <b>prior to Spring 2022 were not migrated</b> over during the transition to the new site.</li><li>Upon initial login, applicant needs to complete Application Screener questions to view previous applications</li></ul>	<ul style="list-style-type: none"><li>If it's a more recent application, we'll need to confirm it's not tied to another account</li><li>Applicant should click on <b>Find the right application</b> link on their Dashboard to complete screener questions and then they will see their previous applications</li></ul>
Applicants complete the application screener questions and then begin application process get a message that they are "ineligible"	<ul style="list-style-type: none"><li><b>4-year:</b> The specific application type for this applicant has not been configured by the institution. <b>Transfer, Returning, and Dual Credit</b> applications are most often not available for applicants</li><li><b>2-year:</b> Institutions can only configure 2-year undergraduate and dual credit applications</li></ul>	<ul style="list-style-type: none"><li><b>4-year:</b> Institutions must configure each of the application types for which they accept.</li><li><b>2-year: <u>Stopgap solution:</u></b> Students should answer the screener questions to get to the Undergraduate 2-year application type.</li></ul>

# Application Screener Results

Our instructions to applicants are to **change the application type results** by going to the Dashboard and select **Find the right application** on the left side of their Dashboard. Answer the questions below to get an Undergraduate 2 or 4 year application:

## Undergraduate (2 year OR 4 year)

Are you currently in high school or middle school?	Yes
Do you plan to apply to an undergraduate program, graduate program, or both?	Undergraduate program
Have you ever taken college courses?	No
Do you plan to apply to an undergraduate program, graduate program, or both?	Undergraduate program
Are you a U.S. Citizen?	Yes

# Role Configurations

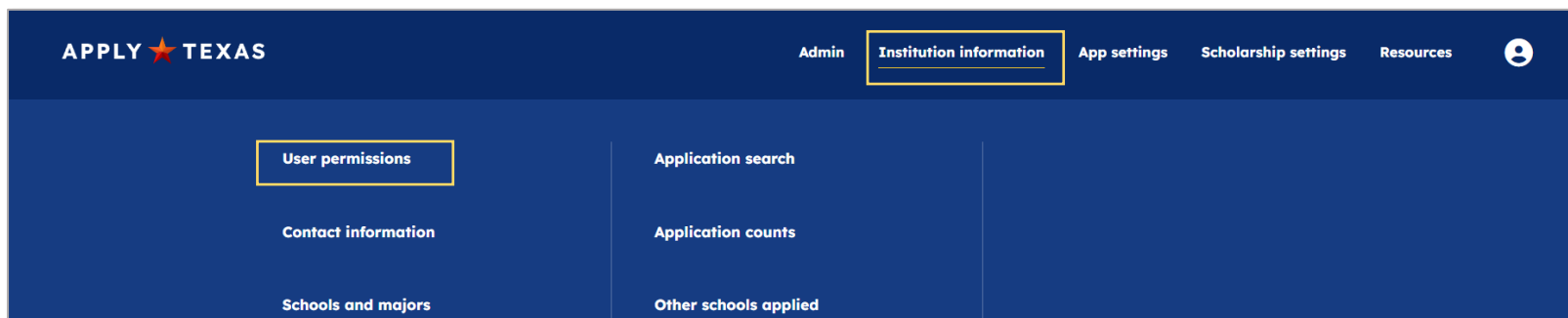
**Application Viewer and Executive Updater roles have now been consolidated under the Gatekeeper role. You can modify user permissions for all your Gatekeepers to limit what they can see. \*Note that there is no “View-only” access at this time.**

**Roles:** As a Gatekeeper, you can customize admin permission settings to manage access across the admin portal.

- Institution Information -> User Permissions -> Search for User -> Edit Permissions -> Authorization

**OR**

- Institution Information -> User Permissions -> Add a New User -> Authorization



For a detailed video of this process, please view the [Admin Portal Adding Additional Users](#) video on the THECB website.

# Role Configurations

You can customize Gatekeeper permissions by checking the sub-permission checkboxes with the additional types of permissions

Everyone who was assigned as an **Executive Updater** or **Application Viewer** in the legacy system can now be reassigned as a gatekeeper, with the following permission sets:

- Transmission settings
- Graduate application settings
- Undergraduate application settings
- Payment settings and
- Scholarship application settings

Select additional permissions user should manage \*

- Authorizations
- Transmission settings
- Graduate applications settings
- Undergraduate application settings
- Payment settings
- Scholarship application settings
- Publication of settings

# Q&A



# Texas Higher Education

## COORDINATING BOARD

Thanks for joining!



# Appendix

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

## 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