

ApplyTexas Training

July 24, 2024

Welcome

Agenda

Welcome

Training Objectives

Application Management Overview

Application Transmission

Application Portal Demo

Knowledge Checks

Deployment Update

Admin Portal Q&A

Admin Portal Training

Objectives



Learn how to search, view and download a student's application information.



Understand how to retransmit applications using the application ID number.



Confirm your understanding of admin portal application management by answering knowledge check questions

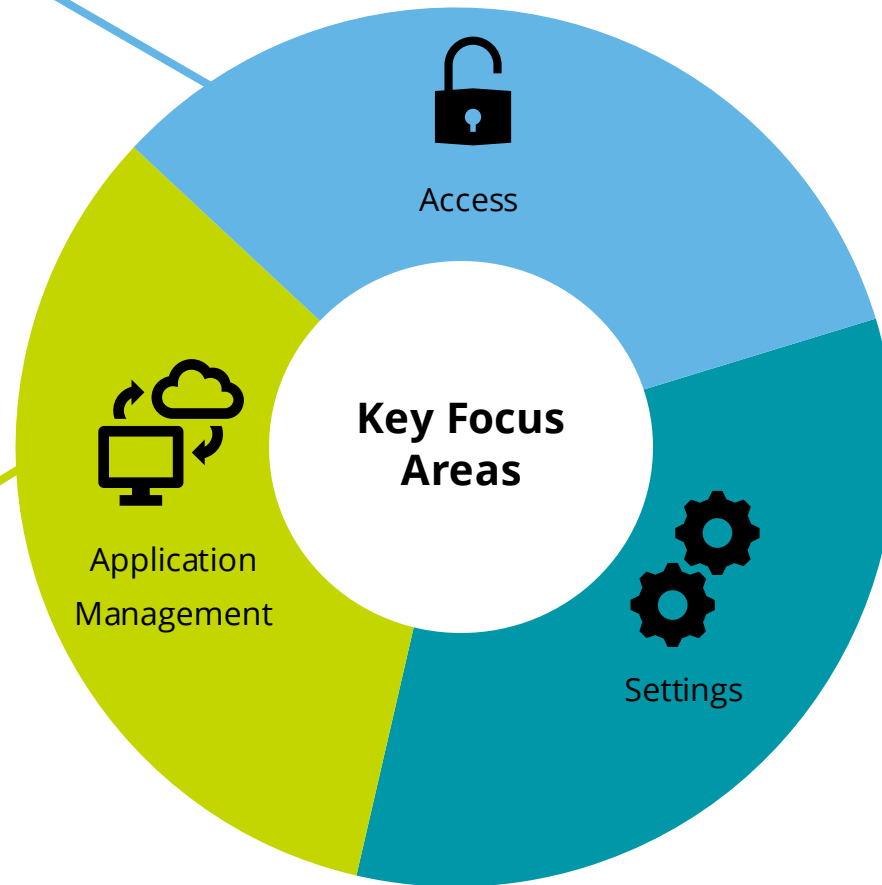
Key Areas in the Admin Portal

Admin Portal Access

- Logging in & MFA Access
- Overview of roles within the Admin Portal
- Set-up, modify, and remove access

Receiving Applications

- 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



Admin Portal Settings

- 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

Key Areas in the Admin Portal

Receiving Applications

- Application search and exports
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Application
Management

Today's Focus
Area

Admin Portal Changes

New Changes!

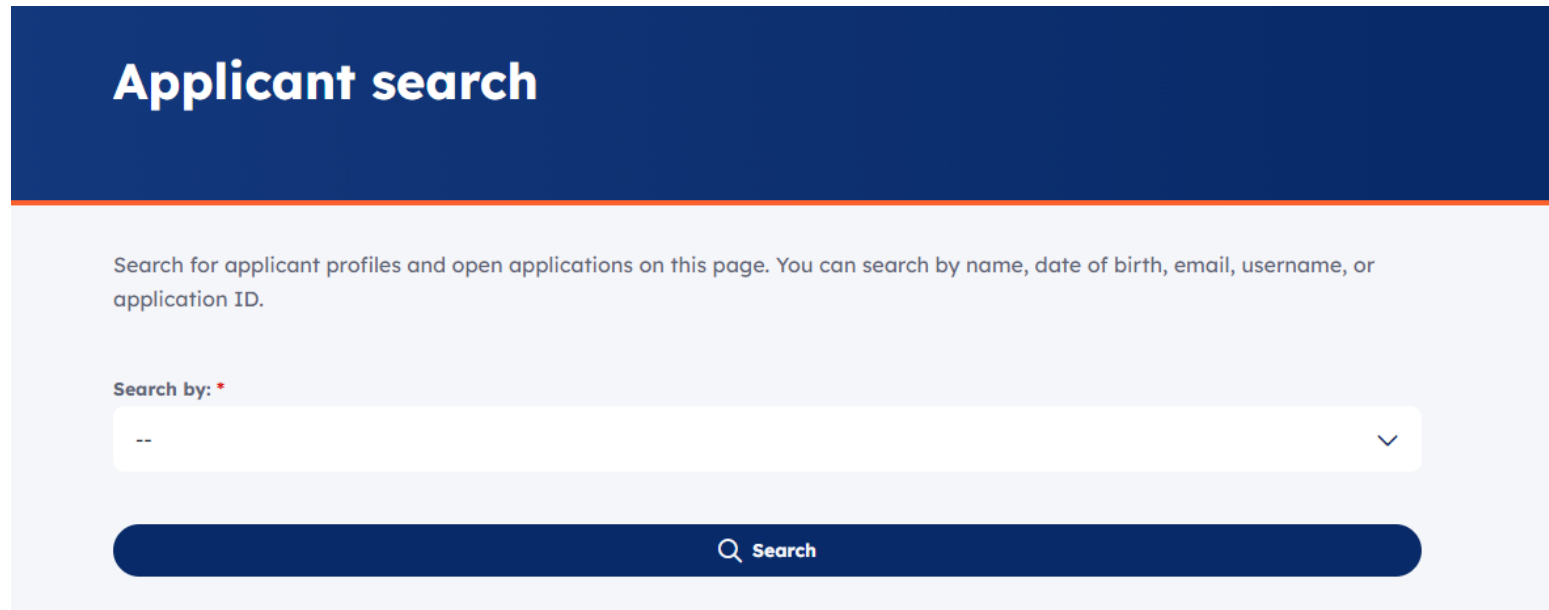
- 1 Dual Credit files:** The naming convention for EDI files will remain the same, except for dual credit which where the first two characters will be "dc" followed by the regular name. EX: "dcxxxxx." IHEs have the option to open dual credit apps as soon as they are ready, starting with cutover of ApplyTexas starting June 7th weekend. If IHEs are not ready to ingest dual credit apps, they can elect to not configure/open dual credit applications, and then no dual credit files will be sent.
- 2 Majors:** The school search contains more majors that may not be available at individual schools. This is intended to allow students to filter down potential applications based on a major instead of a specific school. Once they open an app for your IHE, they will only be able to select the IHE's majors offered.
- 3 TEA TREx Integrations:** The new site will support transcript requests through TEA TREx integrations. Check to be sure your IHE can receive transcripts through TREx from TEA (this is only applicable to participating IHEs)
- 4 Payment System:** Payment will not be accepted within ApplyTexas, and students will be prompted to pay institutions directly.
- 5 Field Changes:** Due to improvements to the application, there will be some small changes to fields in data submission. Your institutional IT lead will need to make necessary adjustments to ensure you are able to receive all application fields successfully.

Application Search

Applicant Search

To search for an application, navigate to the **Admin** tab and click **Applicant search**.

From there, you can search for an application by entering an applicant's email address, username, name and date of birth or their application ID.

A screenshot of the 'Applicant search' interface. The top section has a dark blue header with the title 'Applicant search' in white. Below the header, there is a light gray area containing a search instruction: 'Search for applicant profiles and open applications on this page. You can search by name, date of birth, email, username, or application ID.' Underneath the instruction is a 'Search by:' label followed by a dropdown menu showing '--' and a downward arrow. At the bottom of the search area is a dark blue button with a magnifying glass icon and the text 'Search'.

Applicant Search

Once you find the application you are searching for, you can view the App type, App ID and semester they applied for. To view more, click on View profile or View application.

Search application ID *

Search applicants

Viewing 1 of 1 results Sort By First name (A-Z) ▾

App type	App ID	Semester
Undergraduate (two - year)		Fall 2024

[View profile →](#) [View application →](#)

Applicant Search

Once selected, you can see the status of the application and have the option to download the application file.

Texas State University

Undergraduate (four-year) | Spring 2025

✔ Application submitted Jun 24, 2024

 Download a copy of this application

Note: The application search tool should be used to monitor applications. Applicant information and other confidential data accessed with this tool may or may not be intended for your institution's review. You should make every effort to ensure the confidentiality of this information. Please verify the identity of the applicant when assisting with forgotten passwords. Applicants with incomplete applications may direct questions to your institution's contact.

Admissions application

Application Transmission

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

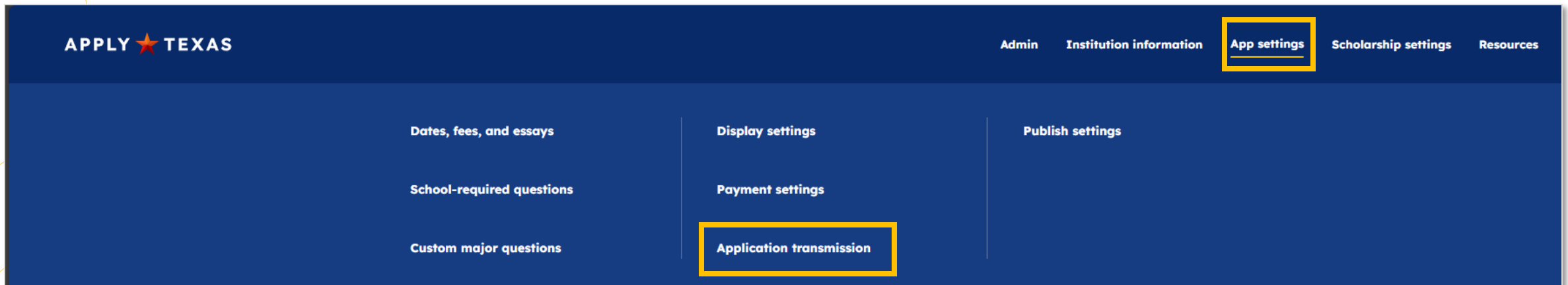
Retransmitting Applications

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.

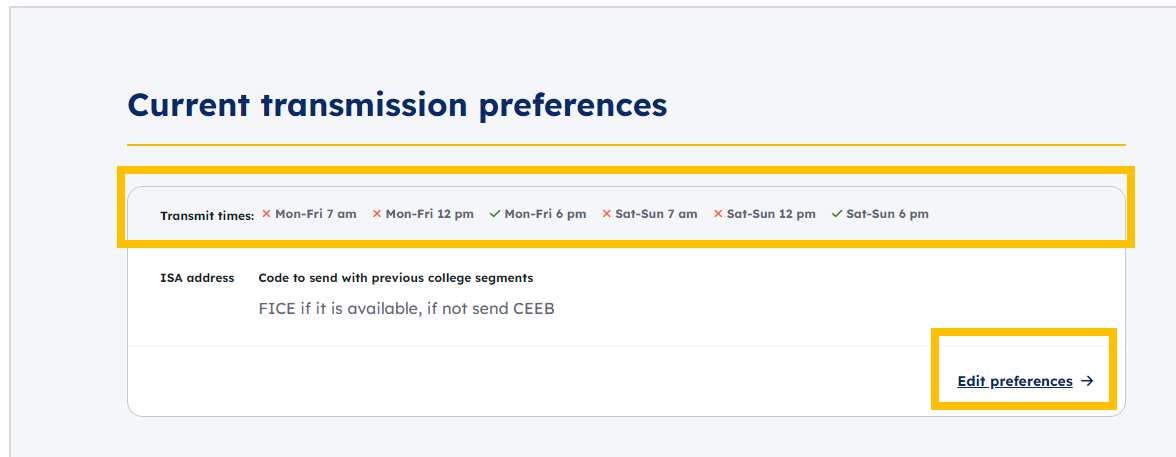
The screenshot shows a web interface for retransmitting applications. It is divided into two main sections: "Environment" and "Transmission details".

- Environment:** Contains a label "Select an environment *" and 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 *" and a dropdown menu with the selected option "Let me enter specific application ids". This dropdown is highlighted with a yellow box.
- Below the dropdown is a text input field labeled "App id *" which is currently empty and highlighted with a yellow box.
- At the bottom of the form is a blue button with a plus sign and the text "+ Add an id", which is also highlighted with a yellow box.

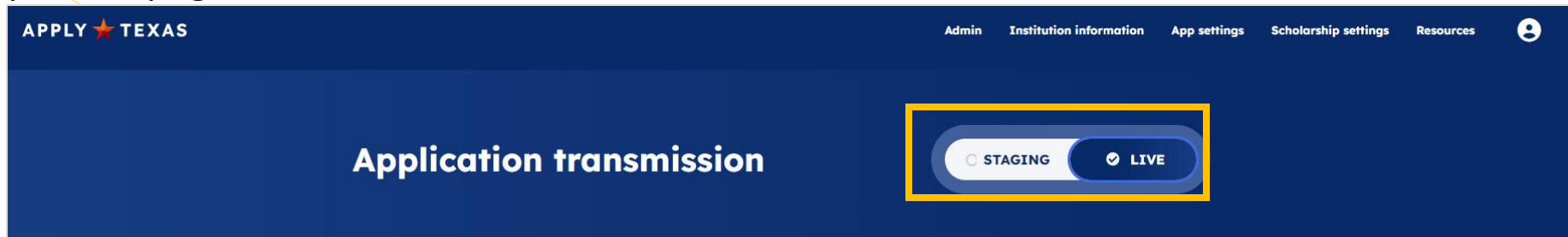
Retransmitting Applications

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.



Demo: Admin Portal

Upcoming Trainings

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
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
Wednesday, July 31 3 p.m. CST	Common Questions & Review Topics	<ul style="list-style-type: none">• TBD

Reminders

- Retire training guides from the legacy system.
 - This causes confusion to applicants when navigating the changes in the ApplyTexas site.

Training Session Recap

Admin Portal Changes:

- Dual Credit files: Naming convention remains the same, except for dual credit where the first two characters will be "dc".
- Majors: The school search now includes more majors, allowing students to filter applications by major rather than school.
- TEA TReX Integrations: The site will support transcript requests through TEA TReX integrations for participating institutions.
- Payment System: Payments will not be accepted within ApplyTexas; students must pay institutions directly.
- Field Changes: Small changes to data submission fields will require institutional IT adjustments.

Searching for an Application:

- Begin configuration for the 2025-2026 semesters by migrating settings from previous semesters.
- Use the Publish Settings page to sync data between staging environments.
- Update additional application configurations in the staging environment.
- After updating settings, use Publish settings to move from staging to live environments.
- Validate data before migration to ensure it's acceptable.

Retransmitting an Application:

Initiating and Managing Transmission:

- Start the transmission process by clicking on "Transmit applications now" followed by "Regenerate Production EDI."
- For specific applications, select "Let me enter specific application ids" from the dropdown, enter the IDs, and use "Add an id" for adding additional IDs.

Finalizing Transmission and Settings:

- Complete the process by clicking on "Transmit applications" after all IDs are entered.
- Check and adjust your Institution of Higher Education's (IHE) transmission times on the "Application Transmission" page under Current transmission preferences by clicking on "Edit preferences."
- Ensure the process is conducted in the live environment by verifying that the box from staging to live is checked at the top of the page.

Deployment Overview

Deployment Overview 7/25

Admin Portal Enhancements:

- **Network activity indicator:** We plan to introduce a new indicator in the Admin portal during CSV downloads to display progress, ensuring a better user experience during data operations.
- **Updated college dropdown list:** We will update the college list dropdown that displays in the admin portal.

Applicant Portal Updates:

- **Update logic for application display vs enforced deadlines:** We plan to update the logic so schools will still display in school search until the enforced deadline.
- **Revised language and conditional logic in Core Questions:**
 - Updating verbiage in Future college/university plans section.

EDI File Adjustments:

- **Addressing blank college city information:** We plan to resolve instances where the college city appears blank in the EDI file.
- **Transmission failure:** We aim to fix issues where applications are marked as submitted but not transmitted even after the application transmission window.
- **Eliminating scholarship transmission duplications:** Our goal is to address duplications in scholarship transmissions.

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Applicant Portal enhancements:

Independent student update:

- Applicants who indicate they are not claimed as dependents will no longer be asked to provide information about their parent or guardian.

College history addition:

- We have added a checkbox for "I can't find my school" to the college history section, aiding applicants in accurately reflecting their educational background when their institution is not listed.

Error resolution in application completion:

- We have resolved errors that some users experienced in completing sections of the application, such as Core Questions.

Admin Portal improvements:

Application and scholarship counts accuracy:

- Updates have been made to ensure application and scholarship counts are displayed accurately, facilitating better tracking and management.

EDI discrepancies:

- We have resolved errors with the duplicate essays EDI issue causing optional essays to populate incorrectly, as well as missing information reported in EDI transmissions.
- IHEs can now regenerate or retransmit applications on their own within the admin portal. Please view the [EDI Regenerate Guide](#) for additional instructions on how to take this action.

Counselor Portal Updates:

Authorization role dropdown update:

- The dropdown menu for the Authorization role has been refined to only include options for 'District Counselor' and 'Counselor,' simplifying role designation and enhancing portal navigation.

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