# CBM Verification Process

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Concurrent Session H1

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# Agenda

- Introduction
- Background
- Overview of CBM001/004/009
- Data Warehouse
- TSU CBM Process
- Verification
- Benefits
- Conclusion – Q/A

# Introduction

- In this presentation, I will go over how Tarleton has consistently submitted error free and validated CBM reports; specifically the CBM001/004/009

- By doing this process, TSU assures that the CBM reports are reporting everything they are supposed to and not missing things like flex courses

- We are a Banner school, so we use the delivered TCC reports. Though the delivered reports are a great starting point, sometimes they do not address each school's individuality in terms of business processes or Banner setup

# Background

- Tarleton State University

  - Fall 2014 enrollment of 11,681 (100% certain)

  - Campuses in Stephenville (main), SW Metroplex, Waco, Midlothian, and Distance Leaners (Online)

  - Banner school since 2004 (PLUS before that)

- Me

  - Tech Support in EM from 2008-2012

  - Senior Database Developer in IR from 2012-2014

  - Coordinator of IE in IR 2014-present

# Overview of CBMs

- CBM001 – The Student Report (CBM001) reflects all students enrolled at the reporting institution as of the official census date

- CBM004 – The Class Report (CBM004) reflects courses as of the official census date

- CBM009 – The CBM009 Graduation Report reflects degrees conferred during the fiscal year

- More information can be found at http://www.txhighereddata.org/ under the 'Reporting to THECB' section

# Data Warehouse

- Oracle database

- Nightly clone of Banner tables (ELT)

- Cron jobs to create custom IR tables (daily registration table)

- PL/SQL Developer application to query data

- WebFocus used as reporting tool

# TSU CBM Process

- Registrar's office runs pre-run processes (001/004)

- Registrar's office runs the CBM report out of Banner

- Delivers file to IR office

# TSU CBM Process – cont'd

- IR uploads the raw file into oracle database

- IR runs custom scripts against the CBM file and the banner/custom tables

# TSU CBM Process – cont'd

- IR gives file back to Registrar's office for submission to THECB

- If file comes back with errors or is out of balance, we repeat the process until files are in-balance and verified from our view

# Verification

- This process was created years ago, but is still used today

- We tweak the code whenever changes occur

# Verification – cont'd

- We have code that checks the CBM001/004 independently for accuracy, but we also have code that compares the two for balance of SCH

- Things we check are: gender, ethnicity, classification, SCH, student major, flex courses, double majors vs dual programs, missing campus codes, and a few other small pieces of data

# Benefits

- Accurate reporting to THECB – less risk of under reporting SCH that is used for funding

- Decreased time from first submission to certification

- Full understanding of your data

- Institutional reporting – "super tables" are created with the certified data for use in Texan Facts

# Conclusion – Q/A

- TSU has a process to verify what is being reported to the CB

- This process has many benefits including on time certification and proper reporting of SCH

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