Texas Higher Education
COORDINATING BOARD

# CBM Reporting 101: A Newcomer's Guide to Data Reporting for Texas Higher Education Institution

Texas Association for Institutional Research (TAIR)

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# Submission Portals

## MOVEit Portal

- CBM002
- CBM003
- CBM008
- CBM00A
- CBM00B
- CBM00C
- CBM00E
- CBM00N
- CBM00R
- CBM00X
- CBM011
- CBM014

https://dsv.thecb.state.tx.us/

## Data Submission Portal

CBM001
CBM005
CBM009
CBM00M
CBM00S
CBM00T
CBM0C1
CBM0CS
CBM0C8
CBM0E1
FAD

https://dsv.thecb.state.tx.us/

# CBM Submission Process

# CBM Data Submission & Editing Process

📌 **Step 1: Submission**
- Data is submitted via **Secure FTP Server (MOVEit)** or **CBPASS Web Application**.
- Institutions receive an **email notification** upon data receipt.

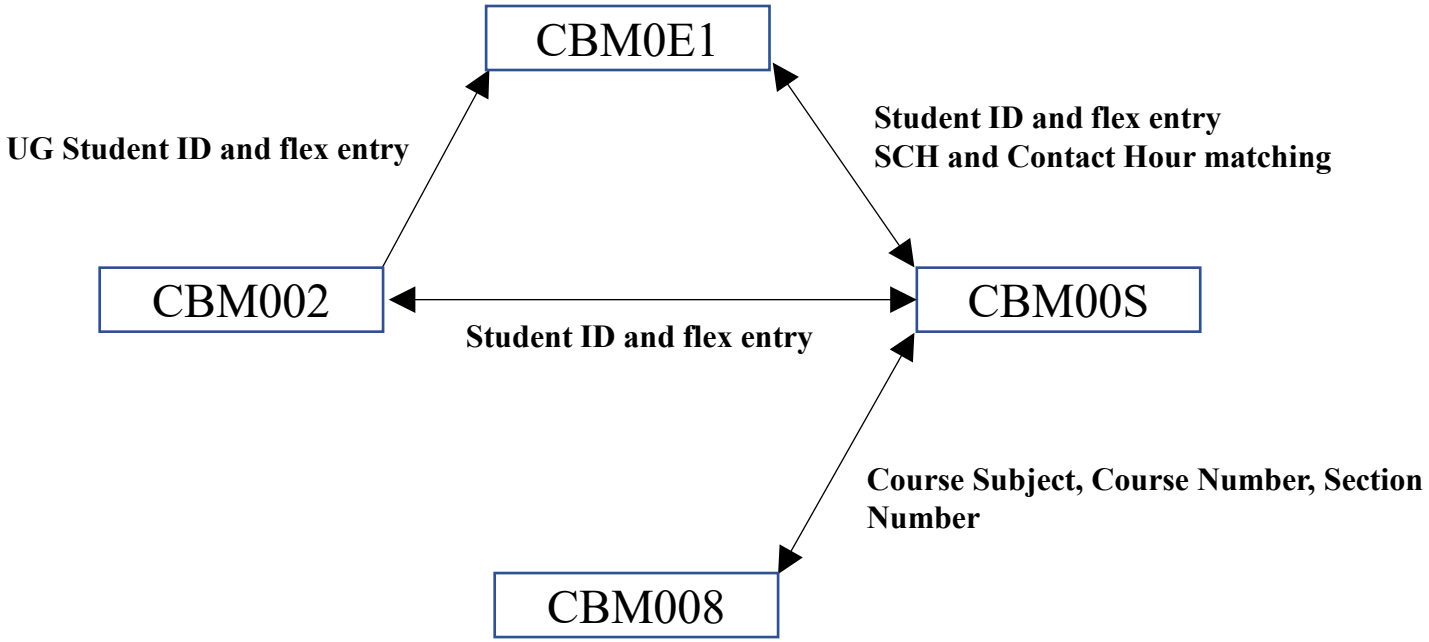
📌 **Step 2: Editing**
- Editing of the report is generated upon successful submission of the report.
- Edit reports are placed in the **OUTPUT directory** on the MOVEit portal and reports processed in CBPASS can be accessed under the 'Reports' tab.

📌 **Step 3: Notification & Review**
- Institutions receive an **email notification** when an edit report is available.
- Institutional personnel will log in, **download**, and **review** the edit report.

📌 **Step 4: Correction & Resubmission**
- If there are any errors and/or mismatches, the data file will need to be **corrected**.
- The revised file is **resubmitted** via the respective portal.
- This process **repeats** until all errors and/or mismatches are resolved.

📌 **Step 5: Certification**
- Institutional Representative will either **email their certification statement** to the Data Analyst for the MOVEit portal or **certify their data** in the Data Submission Portal.
- Data Analyst will **review the certification** statement and will either approve or deny the certification statement.

# Public University and Community and Technical Colleges
# End of Semester Report Matching



# Examples of Relational CBM Reports

- **CBM0C1/CBM0CS** cross-check
  - Student reported on the CBM0C1 must have a corresponding record on the CBM0CS.
- **CBM00A/CBM00C** cross-check
  - Student reported on the CBM00A must have a corresponding record on the CBM00C.
  - The total contact hours of the CBM00A must be within 500 hours of the total contact hours of the CBM00C.
- **CBM00S/CBM002** cross-check
  - Undergraduate students reported on the CBM00S must have a corresponding record on the CBM002.
- **CBM002/CBM0E1** cross-check
  - Undergraduate students reported on the CBM002 must have a corresponding record on the CBM0E1.
- **CBM00S/CBM0E1** cross-check
  - Students reported with a class on the CBM00S report must have a record on the CBM0E1.
- **CBM00S/CBM008 & CBM0CS/CBM008** cross-check
  - Courses reported on the CBM00S must have been reported on the CBM008.
  - Courses reported on the CBM0CS must have been reported on the CBM008.

# What to Look for When the CBM Report is Error-Free

✅ **Data Summary Check**

- Does the **Data Summary** in the edit report match your institution's student information system?

⚠️ **Questionable Messages Review**

- Are there any **Questionable messages** on the report regarding a particular item number?
- If so, do they have any validity?

🔍 **Final Review of Flagged Items**

- Carefully review **flagged items** and any other items for accuracy before finalizing the report.

📝 **Best Practices for Review**

- Cross-check key data points with your internal records.
- Address any inconsistencies before submission.
- Consult your team if any issues arise to ensure accuracy.

# Importance of CBM Reports

**Accurate Calculation of Formula Funding – Ensures fair and precise allocation of resources.**

**Accurate Calculation of Outcome Base Points (CCF) – Supports proper evaluation of student achievement.**

**Accountability System – Maintains institutional credibility and compliance.**

**Educational Research Centers – Provides accurate information for researchers.**

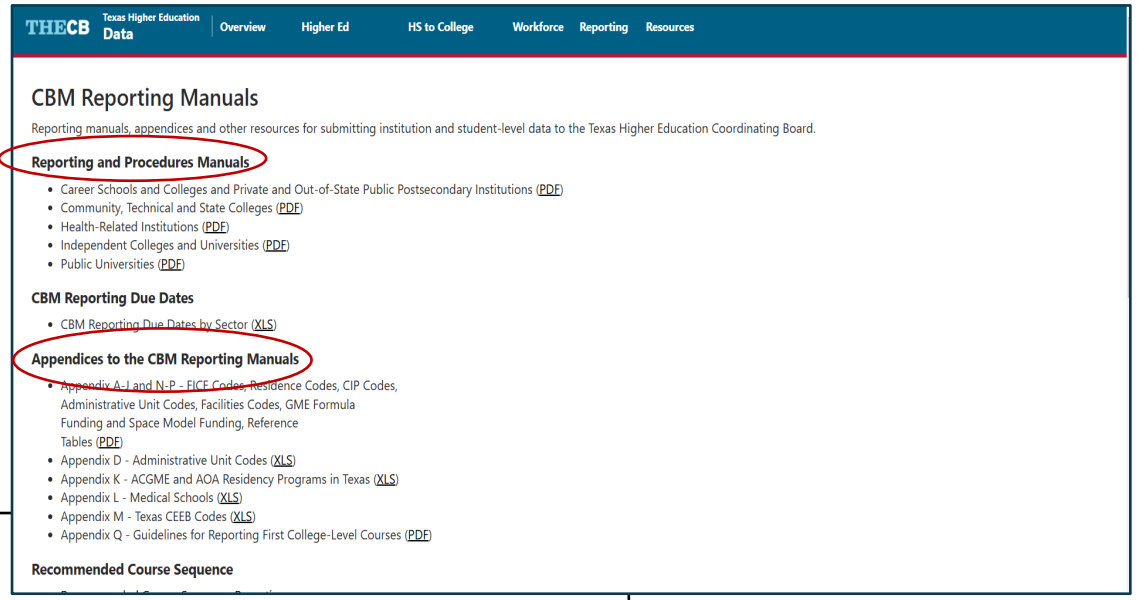
**Verification of Program Effectiveness – Ensures programs meet goals and improve student outcomes.**

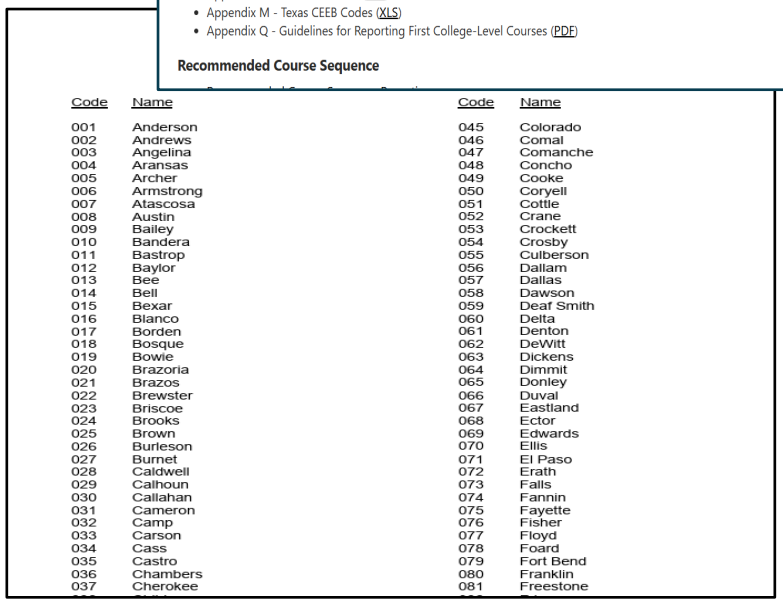
# Supporting Links

# CBM Manual and Appendices

- CBM Reporting Manuals by Sector.
- Appendices to the Reporting Manuals

[CBM Reporting Manuals and Appendices]



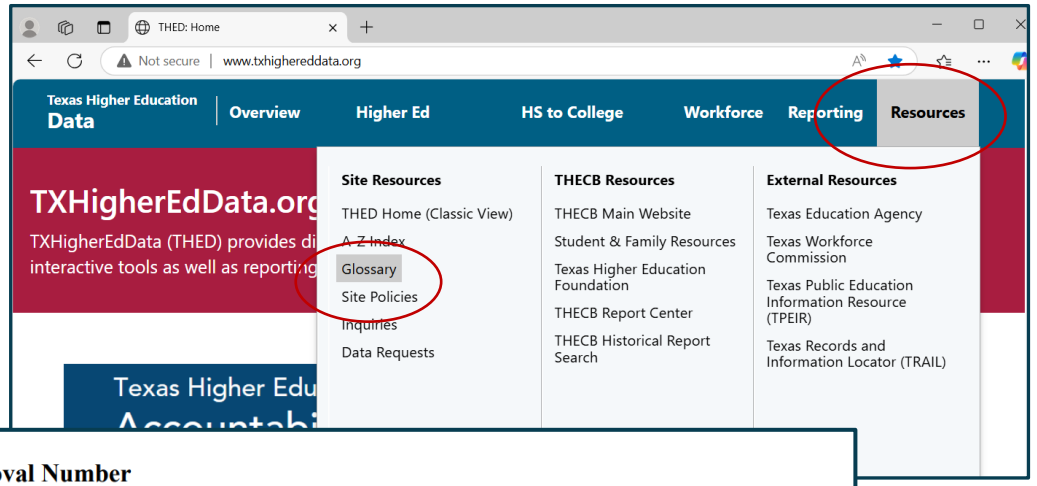



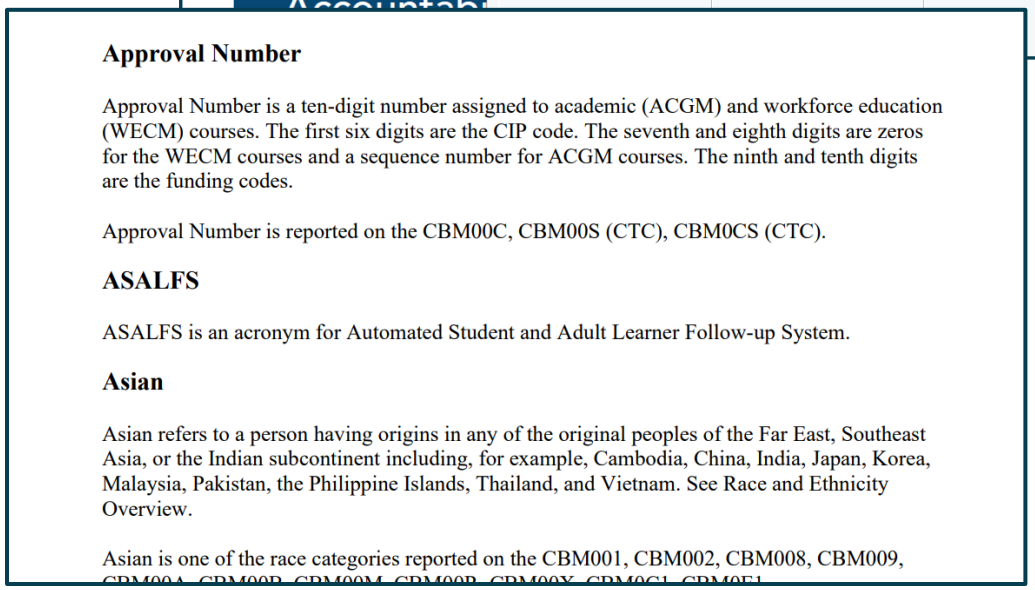
| Code | Name | Code | Name |
|---|---|---|---|
| 001 | Anderson | 045 | Colorado |
| 002 | Andrews | 046 | Comal |
| 003 | Angelina | 047 | Comanche |
| 004 | Aransas | 048 | Concho |
| 005 | Archer | 049 | Cooke |
| 006 | Armstrong | 050 | Coryell |
| 007 | Atascosa | 051 | Cottle |
| 008 | Austin | 052 | Crane |
| 009 | Bailey | 053 | Crockett |
| 010 | Bandera | 054 | Crosby |
| 011 | Bastrop | 055 | Culberson |
| 012 | Baylor | 056 | Dallam |
| 013 | Bee | 057 | Dallas |
| 014 | Bell | 058 | Dawson |
| 015 | Bexar | 059 | Deaf Smith |
| 016 | Blanco | 060 | Delta |
| 017 | Borden | 061 | Denton |
| 018 | Bosque | 062 | DeWitt |
| 019 | Bowie | 063 | Dickens |
| 020 | Brazoria | 064 | Dimmit |
| 021 | Brazos | 065 | Donley |
| 022 | Brewster | 066 | Duval |
| 023 | Briscoe | 067 | Eastland |
| 024 | Brooks | 068 | Ector |
| 025 | Brown | 069 | Edwards |
| 026 | Burleson | 070 | Ellis |
| 027 | Burnet | 071 | El Paso |
| 028 | Caldwell | 072 | Erath |
| 029 | Calhoun | 073 | Falls |
| 030 | Callahan | 074 | Fannin |
| 031 | Cameron | 075 | Fayette |
| 032 | Camp | 076 | Fisher |
| 033 | Carson | 077 | Floyd |
| 034 | Cass | 078 | Foard |
| 035 | Castro | 079 | Fort Bend |
| 036 | Chambers | 080 | Franklin |
| 037 | Cherokee | 081 | Freestone |

# Glossary of Terms

- Understanding common CBM terms ensures consistent reporting.
- Institutions should familiarize themselves with key terms to reduce reporting errors.

[THECB Glossary of Data Terms 2023]



**Approval Number**

Approval Number is a ten-digit number assigned to academic (ACGM) and workforce education (WECM) courses. The first six digits are the CIP code. The seventh and eighth digits are zeros for the WECM courses and a sequence number for ACGM courses. The ninth and tenth digits are the funding codes.

Approval Number is reported on the CBM00C, CBM00S (CTC), CBM0CS (CTC).

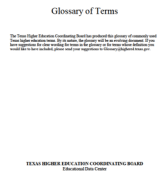
**ASALFS**

ASALFS is an acronym for Automated Student and Adult Learner Follow-up System.

**Asian**

Asian refers to a person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam. See Race and Ethnicity Overview.

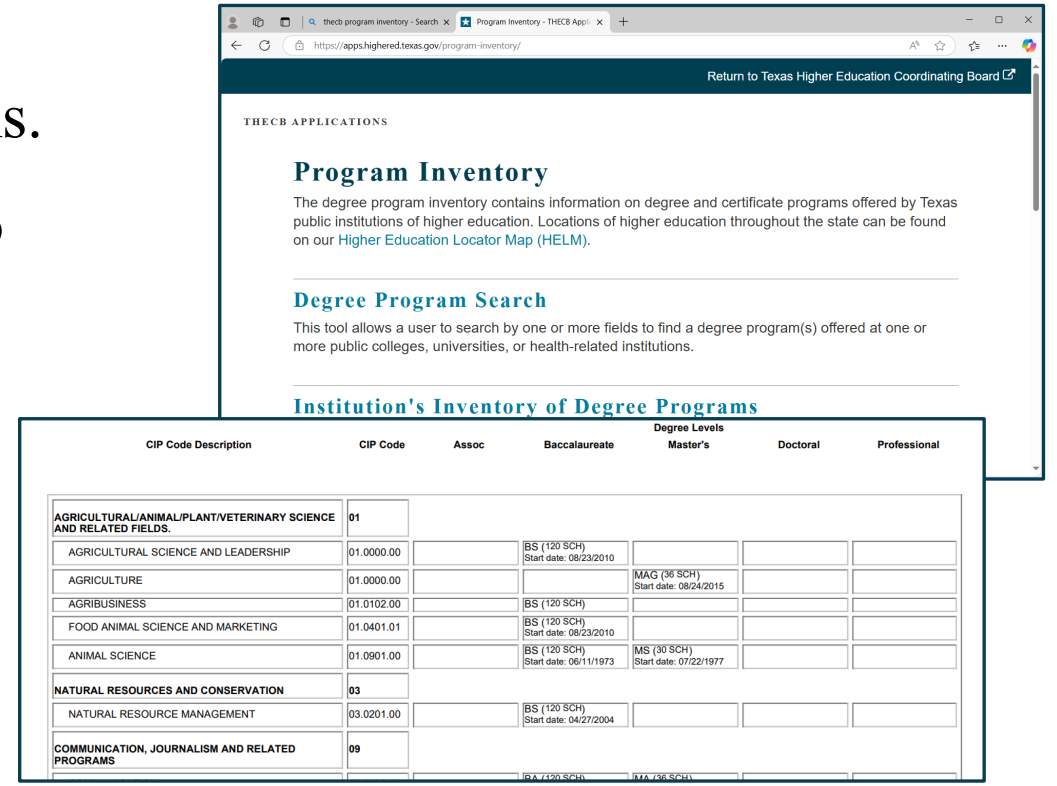
Asian is one of the race categories reported on the CBM001, CBM002, CBM008, CBM009,



# Clearinghouse/Program Inventory

- Program inventory records help maintain an accurate account of available academic programs.
- Institutions should ensure their records are up to date to avoid reporting discrepancies.
  - Regular updates to program inventory ensure compliance.
  - Institutions should utilize available resources for tracking changes.

[Program Inventory - THECB Applications]



# Additional Links

📌 **Community, State, and Technical Colleges**

- Workforce Education Course Manual (WECM)
- Academic Unique Number (AUN)
- CTC Clearinghouse

📌 **Most Sectors** *(Excluding CTC Institutions)*

- CIP Code Inventory

***Please reach out to your Data Analyst for additional links***

# FAST Reporting

# FAST Program

The Financial Aid for Swift Transfer (FAST) program provides funding to participating public institutions of higher education so they can offer dual credit courses to educationally disadvantaged students at no cost to these students.

FAST funding is disbursed to

- eligible institutions
- for eligible students
- taking eligible dual credit courses.

*FAST is a new program first implemented in 2023-24.*

Website: FAST - Texas Higher Education Coordinating Board

# FAST Eligibility

To be **eligible** for the FAST program, a student must meet all three criteria:

1) have been **educationally disadvantaged** (qualified for participation in the National School Lunch Program) at any time during the **four school years prior** to enrollment in the dual credit course for the current academic year

THECB verifies against TEA data

2) be **enrolled in and eligible for Foundation School Program funding** at a high school in a Texas school district or charter school under the rules of the Texas Education Agency

Institution must confirm enrollment in eligible high school. THECB will not have data until true-up

3) be **enrolled in a dual credit course** at a participating institution of higher education that has a dual credit agreement (MOU) with the student's school district

# FAST Process Flow

**Step 1:** Institutions **confirm** participation in the FAST program.

**Step 2:** Institutions **submit** educationally disadvantaged eligibility rosters to confirm student eligibility. THECB returns the eligibility status for students on the roster.

**Step 3:** Institutions **submit** funding rosters. THECB calculates funding amount using CBM data as basis. Roster information is used for data validation and for providing data elements not included on CBM (e.g., School District Code). Funding is based on total SCH taken by eligible students.

**Step 4:** Institutions **certify** funding amount.

**Step 5:** Funding is dispersed to institutions.

**Step 6:** THECB completes true-up process. THECB uses TEA data to confirm the student's high school enrollment associated with funding.

# FAST Rosters

**Eligibility Rosters – For Institutional Use**

- Students are matched with TEA attendance data to determine educationally disadvantaged eligibility based on prior four years
  - For students enrolled in FY 2024-25, eligibility is based on FY 2020-21 through FY 2023-24
  - Institutions can submit multiple eligibility rosters to resolve student information issues
  - Educationally disadvantaged is only one of the three criteria for student's eligibility for FAST funding

**Funding Rosters – Used by THECB to Validate FAST Funding**

- Institutions submit funding rosters. THECB calculates funding amount using CBM data as basis and compares to roster.
  - Roster information is used for data validation
  - Roster serves as source for data elements not included on CBM (e.g., School District Code).

# FAST Roster Submission

FAST_Sum24_Elig_001234_InstitutionName

| | A | B | C | D | E | F | G | H | I |
|---|---|---|---|---|---|---|---|---|---|
| 1 | FICE | TSDSID | SSN | AltID | Fname | MI | Lname | DOB | CBM_InstID |
| 2 | 12345 | 1234567890 | 123456789 | S12345678 | Jessica | G | Smith | 19990211 | A12345678 |
| 3 | 1234 | 123456789 | 123456 | S12345678 | Jessica | G | Smith | 19990211 | A12345678 |

1) Use the provided template.
   a) Submit as a CSV file (not as Excel).
   b) Update only FICE and institution name in the file name.
2) Upload to MOVEit.
3) Submit the Certification Statement via Qualtrics.
4) Notify Crystal Mooney of the submission.
5) Analyst review:
   1) Check the roster and certification statement.
   2) If issues/errors are found, analyst will contact the reporting official.
6) If no issues/errors, analyst will process and return the roster/report.

# Educationally Disadvantaged Indicator

1 – indicates that the student was found in TEA attendance data and identified as educationally disadvantaged

0 – indicates that the student was found in TEA attendance data but was **not** identified as educationally disadvantaged

Blank – student was not found in TEA attendance data

- TSDS IDs or SSNs
- The student just enrolled for the Academic Year 2024-2025 into a Texas public school district or charter
- A student is homeschooled and enrolling through the district for services (although this is very rare)

# Questions?

Scan the QR code to complete the session survey.

Texas Association for Institutional Research

Annual Conference: February 25-28, 2025
Omni Hotel in Corpus Christi, TX

# Thank You!