Objectives

- To supplement the TEA online training modules
- To successfully complete the training assessment
Training Agenda

- Introduction
- Part I-Access to the Appropriate Programs
- Part II-Create a Folder on your desktop for TREx
- Part III-Processing Items Requiring Attention
  - Generating the Student Extract
  - Adding Attachments
TREx Overview

- Texas Records Exchange is the name selected for the electronic student record system required by House Bill 1 passed by the 3rd special session of the 79th Texas legislature.

- TEC 7.010 requires that education records be sent electronically within 10 working days of request by a district in which the student has enrolled, including information on course completion, teachers, special ed, IEP, and personal graduation plans.

TREx Overview

- School Registrars and those with a TREx role can use TREx to send and receive student records and transcripts from one school to another.

- High School Registrars are able to use TREx to send transcripts to institutes of higher education who subscribe to the UT SPEEDE server.
Part I

Access to the Appropriate Programs

- **HISD Connect SIS** – Approved role
  - Elementary & Middle – TREx
  - High Schools – High School Registrar
  - Complete the HISD SIS Form
- **TEAL (TEA Login)**
  - Campus Registrar Role
  - Complete Online TREx Tutorials
- **TREx**
HISD Connect

- Complete the new HISD Connect SIS Form
- Scan & send completed document to the SIS security inbox address on the form
- If you are changing schools, please include your TEAL Username. Example Marie.Jones4

TEAL

- Complete 8 TEAL Tutorial Modules.
- Apply for TEAL account at https://pryor.tea.state.tx.us/.
TREx Access

- Access Instructions
  - TEAL/TREx Access Instructions
- TEA Emails Username and Password

Part II

Create a folder on your desktop for TREx
(stay organized...)

Student Records Department
Part II

Processing All Items Requiring Attention

Student Records Department

Fulfilling a TREx Records Request

- Generate an extract for all requests.
- Open HISD Connect where HISD stores student records.
- Run the extract in HISD Connect to remove a copy of the record.
- Save the extract file to the TREx folder on the desktop. Keep HISD Connect open.
- Login and use TREx to upload the file from the desktop or the folder where you saved it.
- Send the record through TREx.
Part III

Generating the Student Extract

Student Records Department

TREx

All items requiring attention should have a zero by the link

Student Records Department
It is important to click on the DETAILS link to determine what the requesting school is requiring.

Student Records Department

After determining the details, you are now ready to process the extract in HISD Connect.
Step 1: Generate Extract

- On the Start Page, click **State Reports**

Step 2: Select TREX Extract by Student Number

If you are not a high school registrar, go to Actions, Switch Roles and choose TREX ROLE
Step 3: Clearing Defaults

NOTE: The clear all setting allows the user to clear the default boxes previously used.

TREx Extract by Student Number

- Report Information
  - Description: Extracts information for the TREx submission
  - Version: 1.0.10
  - Output File Name: TREx_[Timestamp]
  - Category: State Reports
  - Published Date: 07/02/2020 01:07 AM
  - Teacher Safe: No
  - Comments

Click on District Set Up.

Step 4: Student Selection

Enter the student number for up to 10 students

Choose up to 19 students to process identified by student number

- Student Number to Process
- Student Number to Process
- Student Number to Process
- Student Number to Process
- Student Number to Process
- Student Number to Process
- Student Number to Process
- Student Number to Process
- Student Number to Process

Student Records Department
Step 5: Student Selection Information

1. Select Student Contacts as the Source for Contacts
2. Verify the Current Academic School Year is selected
3. Determine which Historical Grades to include
4. Select the Grade Type Determine if SAT/ACT should be included
5. Determine if EOC Assessment Waivers should be included
6. Specify which grades represent Incomplete, leave blank if the default I is used, separate grades with a comma if more than one grade represents an incomplete.

Step 6: Student Selection Information

1. Select Graduates only from the Use Calculated Class Rank Fields from Class Rank Tab
2. Select No for Exclude Class Rank
3. Select Weighted for Class Rank/GPA Method
4. Select No for Use GPA Override
5. Select No for Use Class Rank Overrides
6. Leave the Class Rank Date blank
Step 7: When to Generate Extract

Run Now

Scheduling

Please select when to run

- Run Now
- Schedule

Schedule for later.

Scheduling

Please select when to run

- Run Now
- Schedule

Please select schedule settings

- Start Date: 8/23/2021
- Start Time: 09:48 AM
- Run Once

Repeat: Daily, Weekly, Monthly, Yearly
Step 9: Ready to Generate Extract

- Whether to run now or schedule for later click submit.

Scheduling

Step 10: Running the Extract

- On Submit of the TREx by Student Number page, the Report Queue (ReportWorks) – My Jobs will display.

Report Queue (ReportWorks) - My Jobs

Student Records Department
Step 11: Refresh the Extract

Click the Refresh button.

Step 12: Waiting on the Completed Status. TREx Extract is ready!!

1. When the report moves from the Queued Reports area to the Completed area of the Report Queue page, click the word Completed to download the zipped folder of TREx file.
Step 13: Click on the Zip File

Completed Reports

<table>
<thead>
<tr>
<th>Created On</th>
<th>Report Name</th>
<th>Started</th>
<th>Ended</th>
<th>Created By</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/15/2021</td>
<td>TRX by Student Number</td>
<td>08/15/2021 09:34 AM</td>
<td>08/15/2021 09:54 AM</td>
<td>Robinson, Chris A</td>
<td>Completed</td>
</tr>
<tr>
<td>08/16/2021</td>
<td>TRX by Student Number</td>
<td>08/16/2021 04:10 PM</td>
<td>08/16/2021 04:30 PM</td>
<td>Robinson, Chris A</td>
<td>Completed</td>
</tr>
<tr>
<td>08/16/2021</td>
<td>TRX by Student Number</td>
<td>08/16/2021 09:23 PM</td>
<td>08/16/2021 09:43 PM</td>
<td>Robinson, Chris A</td>
<td>Completed</td>
</tr>
</tbody>
</table>

Student Records Department

Step 14: Zip File opens in new window

Student Records Department

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Step 15: Zip File opens in new window. The extracts are displayed. Create a TREx Folder under the OneDrive Header on the left side of your page. Save the extract.

Step 16: Below is an example of the TREx extracts that will reside in the TREx Folder.
Step 16: Drag the extract to the TREx Folder. Notice the file is saved as XML.

IMPORTANT

TEAL and TREx- Do Not use CHROME

Enter TEA username and password
**TEAL and TReX**

Student Records Department

**Fulfilling TReX Request**

- Access the link Inbound Request/ Transcript
- Any request greater than 0 requires attention
After the page updates, begin process the oldest request.

Fulfilling the Request

After the screen uploads, select the oldest request and fulfill it and upload the HISD Connect extract.
Click upload

Upload the PowerSchool extract from the TREx folder
Select the Browse key and search for the PowerSchool extract
Select Upload and the PowerSchool extract will upload

Upload Records/Transcripts for institution ATTUCKS MIDDLE

Please browse for a record file to be uploaded:

Browse...
Step 13: Uploading a Data File

File is uploaded
Note the **green** highlighted bar indicated an extract has successfully uploaded. Next.
Type a short message, click the acceptance square and hit send

Use the print button to keep a paper record of the transaction.
Part III

Adding Attachments

- Generate the extract in HISD Connect
- Go to Manage Records/Transcripts in TREx
- Upload HISD Connect extract and view as a PDF
- Scan the attachments
  - Save with the correct naming convention
  - Save in the TREx folder on the desktop.
- Click Add Attachments on the line with the student record to complete the process
Adding Attachments via HISD Copier

- Scan the attachment(s) and email to yourself
- Open your email
- Save the attachments in the TREX folder using the naming convention (see upcoming slide)
- Upload the attachment - “add attachment”

Naming Conventions for Attachments

####LastName_FirstName_Descriptor##

#### = last 4 digits of the Student ID
LastName = student’s last name
FirstName = student’s first name
Descriptor = le (Limited English Proficiency (LEP) attachment)
## - two-digit generation number (01-99)* to allow for multiple attachments within type
Descriptors for Attachments

le - Limited English Proficiency (LEP) attachment
im - Immunization record attachment
gt - Gifted/Talented (GT) attachment, such as a GT profile
ms - Miscellaneous record
ot - Other – to be used for any document that the district is uncomfortable giving any indication of what is contained within the document
tl - Transcript Legend

Numbers for Attachments

## - two-digit generation number (01-99)* to allow for multiple attachments within type

*Note: Numbers 81-89 under ms (miscellaneous record) are strictly reserved for Disciplinary Action Attachments.

*Note: Numbers 91-99 under ms (miscellaneous record) are strictly reserved for Individual Education Plan (IEP) attachments.
Examples of Attachments

The student record extract file is named:
1234Shaw_Laura_stu
The attachments are named:
1234Shaw_Laura_im01(Immunization Record)
1234Shaw_Laura_le01(LEP Assessment Profile)
1234Shaw_Laura_le02(Second LEP document)
1234Shaw_Laura_ms01(Testing document)
1234Shaw_Laura_ot81-Unexpired Disciplinary Action document
1234Shaw_Laura_ot91(IEP document)

Step 1: Locate the student record
Step 2: Click Add attachment

A – Student record/transcripts that you accept and receive also can be found in the Manage Records location. If the record includes attachments, you can view or download them by selecting the Attachments link after you have accepted the record.

B – Select the Add attachment link to add an attachment to a student’s record.

Step 3: Click Browse and complete the process

A – Select the Browse button to find an attachment. Navigate to the location of the file and select the Open button.

B – After adding an attachment (A), TREx automatically prompts you to be able to add another attachment.

C – Select the Upload button to finish the attachment upload process.

D – Select the Cancel button to end the add attachment process without uploading the attachment file.
Step 4: Results

A – If the record includes attachments, you can view or download them by selecting the Attachments link after you have accepted the record.

Logout of TREx

A – Select the Logout link to end the TREx session.
**TEA TEx Online Training Modules**


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**Confidentiality**

- TEx files are copies of student records and must be protected at all times.

- Since each file includes a part of the student social security number and the name, be very careful to save files only on secure computers.