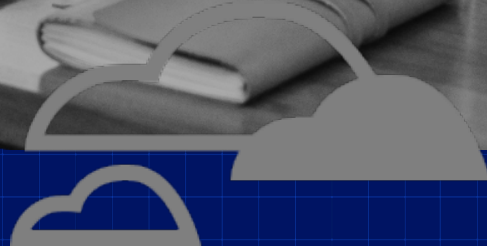


APPLY  TEXAS

Annual Rollover & Testing



June 1, 2026

Agenda

- 1** Configuring Majors & Applications
- 2** Configuration Testing
- 3** Common Misconceptions
- 4** New EDI Documentation

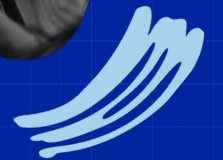


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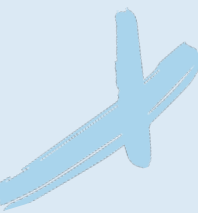


Configuring Majors & Applications

The following steps should be followed to configure new or updated majors and applications ahead of the new cycle. These steps can be followed at any time using the Live Admin Portal Environment



Demo



Schools & Majors Manual Configuration



- **Go to:** Institution Information > Schools and Majors
- **Pick Area:** Staging
- **Select Semester:** ex: Fall 2027
- **Create School (if needed):**
 - Click Create School
 - Enter school code and name (ex: “ENGR” – College of Engineering)
 - Select which application types it applies to (ex: UG 4-Year, Graduate)
- **Create Major:**
 - Click Create Major
 - Assign to an existing school for the selected semester
 - Enter required fields:
 - Major code and name
 - Application type(s)

Schools & Majors Migration



- **Go to:** App Settings > Publish Settings
- **Set Area:** Staging to Staging
- **Record Type:** Schools & Majors
- **From Semester:** ex: Fall 2026 , **To Semester:** ex: Fall 2027
- Enter your **email address** and click **Publish** to copy data
- Once completed, you will see confirmation on the screen, as well as via email, indicating that your majors have been successfully published.
- Review and edit majors as needed in Schools and Majors for the new semester
- **Recommended for:** rolling over large numbers of unchanged majors

Application Manual Configuration



- **Go to:** App Settings > Dates, Fees, and Essays
- **Set Area:** Staging
- **Select Semester:** ex: Fall 2027
- For **each application type** (UG 2-Year, UG 4-Year, Transfer, Graduate, etc.):
 - Display and enforce dates
 - Fees and fee waivers
 - Optional essay display
 - URLs for program info (if applicable)
 - Core questions (ex: residency, extracurriculars, employment)
- **Save settings** only after all required fields are filled

Application Settings

- **Go to:** App Settings > Publish Settings
- **Set Area:** Staging to Staging
- **Record Type:** Dates, Fees, and Essays (repeat for others like School Questions)
- **From Semester:** ex: Fall 2026 To Semester: ex: Fall 2027
- Enter your **email address** and click **Publish** to copy data
- Once completed, you will see confirmation on the screen, as well as via email, indicating that your majors have been successfully published.
- Review and edit semester-specific content (ex: updated deadlines, fees)

Publish Settings

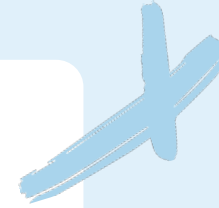


Once you're ready to push all your changes to the live site you can go ahead and publish them.

- Go to App Settings > Publish Settings
- Environment: Staging to Live
- Select the record types to publish (e.g., Majors, Dates/Fees/Essays, School Questions)
- Review differences using the comparison table
- Enter your email & click Publish

Quick Recap

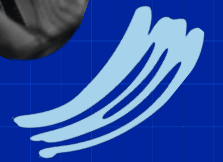
- Always start by setting up your schools and majors
- Application settings are semester-specific so configure each semester separately
- Use the staging area to make changes first
- Use the publish settings tool to move your work to the live area
- If unsure where to start, copy settings forward from a previous semester



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ApplyTexas *Configuration Testing*

The following information is important for configuration testing during the upcoming June and July testing windows using the Admin Portal Testing Environment



Configuration Testing Purpose



Configuration Testing enables institutional partners to validate and review application configurations before they are published to user.

During Configuration Testing, you can:

- Make updates to application settings and setup new semesters
- Confirm applications are functioning as expected in the Applicant portal
- Ensure students see the intended application experience
- Ensure the following semesters are setup
 - Fall 2027
 - Spring 2028
 - Summer I 2028
 - Summer 2028
 - Summer II 2028

Testing Windows & Access



Testing Window 1:

- **Opens:** Monday, June 8 at 9:30A CDT
- **Closes:** Friday, June 12 at 5:00P CDT

Testing Window 2:

- **Opens:** Monday, July 6 at 9:30A CDT
- **Closes:** Friday, July 10 at 5:00P CDT

Important Reminder:

- Access to the testing environment will only be available during these testing windows.
- Users will not be able to access the environment outside of these windows.


Who Should Participate



The following groups are encouraged to participate in testing:

- ApplyTexas Gatekeepers
- Institutional staff responsible for application configuration
- Staff responsible for validating the student application experience

Why Participation Matters – Testing helps institutions:

- Validate application setup before launch
 - Ensure accurate student-facing experiences
 - Identify configuration issues early
- 

How to Participate



Everyone MUST provide their testing credentials ahead of the upcoming testing windows

- **Deadline:** Submit all pre-registered testing credentials no later than **Wednesday, June 3 at 5:00 PM CDT**. All credentials submitted should already be created in the Live environment.
- **Important Reminder:** All credentials were wiped from the testing environment – you must re-register your credentials for the upcoming testing, even if you participated in the May Feature Testing.
- **Participants must provide:**
 - Admin Portal testing credentials
 - Applicant Portal testing credentials
- **Why Both Accounts Are Required**
 - Both Admin and Applicant accounts are necessary for staff responsible for configuring and validating application settings

Testing Process



Step 1 – Configure Applications

Sign into the **Admin Portal Testing Environment** to:

- Update application settings
- Configure semesters
- Make application changes


Step 2 – Validate Student Experience

Sign into the **Applicant Portal Testing Environment** to:

- View application changes as a student
- Confirm configurations display correctly
- Validate the expected student experience

Step 3 – Publish New Application Settings

Once you have validated your new settings, sign into the **Admin Portal Live Environment** to:

- Publish settings from Staging to Live (see steps on Slide 9)
- 

Publish Application Settings



- **Go to:** App Settings > Publish Settings
- **Set Environment:** Staging to Live
- **Record Type:** Select the record types to publish (e.g., Majors, Dates/Fees/Essays, School Questions)
- **Select Semester:** ex: Fall 2027
- Review differences in the comparison table
- Enter your **email address** and click **Publish** to copy data

Admin and Applicant Portal Testing Environments



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Institution information App settings Scholarship settings Resources

Admin Portal Testing Environment
Changes made here are not visible to students. They will appear in the Applicant Portal Testing Environment and the Staging area of the Admin Portal.
[Learn how testing and publishing works](#)

Dates, fees and essays

STAGING

This form requires you to enter deadlines, open dates, essay requirements, and messages you'd like to display to applicants for each semester and application type. All fields must be completed before saving each application type.

Semester
Fall 2028

Undergraduate (four-year) Expand

Transfer Expand

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Dashboard Core questions School search Welcome, Margot

Applicant Portal Testing Environment (View-Only)
This is a view-only environment. It displays how updates from the Admin Portal Testing Environment or Admin Portal Staging will appear to students, helping you preview and confirm the student experience before publishing.
[Learn how updates work](#)

East Texas A&M University

- Application overview
- Major
- School-required questions
- Essays

East Texas A&M University

Public university | Commerce, TX

School website

Use this contact information to reach out to this school with questions about your application.
Admissions@tamuc.edu 903-886-5000

Application overview

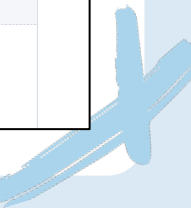
Delete application

Undergraduate (four-year) • Spring 2027

Requires: Essay SAT/ACT Available: Scholarship application

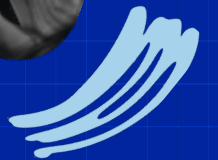
Application ID	Application fee	Application opens
2300001318	--	Apr 04, 2026

SAT	ACT	Avg. tuition	Graduation rate	Total enrollment
-----	-----	--------------	-----------------	------------------



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Common Misconceptions




Misconception # 1



“I already have an Admin Gatekeeper or Applicant account I use for testing, so I do not need to provide credentials.”

Reality

All testing credentials must still be submitted for pre-registration access.




Misconception # 2



“I can access the Testing Environments at any time to conduct Configuration Testing.”

Reality

Configuration Testing can only be conducting during the specified testing windows. Users attempting to access the Testing Environment outside of the windows will see the maintenance page.



Misconception # 3



“I can use the same email for both the Admin and Applicant portals.”

Reality

Separate email addresses are required for Admin and Applicant accounts.



Misconception # 4



“I provided my Admin Gatekeeper account, so I do not need to provide an Applicant account.”

Reality

Both Admin and Applicant accounts are required for testing.




Misconception # 5



“My account must be created in the testing environment, so I will provide an Applicant account for THECB to create for me.”

Reality

Institutions are responsible for creating their own Applicant accounts in the live environment before registering credentials with THECB. Please send your existing Admin account credentials along with any Applicant accounts that you have already created and want to test with.



Misconception # 6



“I can use a non-Gatekeeper Admin account to participate in testing.”

Reality

A valid Gatekeeper Admin account is required for Admin Portal configuration testing.




Misconception # 7



“I cannot use the same credentials I used during feature testing.”

Reality

Previously used credentials may be reused but they **must** be re-registered with THECB



Misconception # 8



“I want multiple staff members to help review changes as students, and they do not need accounts.”

Reality

Anyone participating in testing must have their own Applicant account and be pre-registered for access.




Misconception # 9



“I can submit applications to multiple institutions during testing and view all of them in the Admin Portal.”

Reality

Participants can submit applications to any institution through the Applicant Portal during testing. However, institutions can only view and manage applications associated with their own institution in the Admin Portal test environment.




Misconception # 10



“I can submit multiple applications to the same institution for the same term and application type”

Reality

Participants can only submit one application to the same institution, application type, and term combination. Multiple applications are permitted only if the application type or term is different, or if you are submitting a Graduate application.



Reporting Errors & Issues



- **If Errors Occur**
 - Please report issues using the Smartsheet feedback form.
- **Priority will be given to addressing:**
 - Global system issues
 - Issues preventing institutions from setting up applications
 - Other reported issues will be reviewed, assessed, and prioritized as appropriate.



Important Next Steps



Submit Pre-Registered Testing Credentials – an email will be sent after this session to collect credentials

Deadline: Wednesday, June 3 at 5:00P CDT

Participants must submit:

- Admin Portal testing credentials
- Applicant Portal testing credentials

Important: Only pre-registered users will receive access to the testing environment during the testing windows.



Resources

- ApplyTexas Resources:
<https://www.highered.texas.gov/applytexas-resources/>
- New EDI Documentation



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New EDI Documentation



EDI Documentation: Undergrad 4-Year and 2-Year



The EDI documentation has been updated – see screenshot below for sample formatting:

Header Record			
Text Field	EDI Field(s)	Does Module Have Capability to Turn On or Off? (Yes or No)	Notes
Detail Records			
Background Information			
Name Type	IN1!1!02!!!!18\		
First Name	IN2!02!		
Middle Name	IN2!03!		Field is not passed if middle name is not provided
Last Name	IN2!05!		
Suffix	IN2!09!		
Preferred Name	!!N2!18!		
Other First Name	RQSI!AQ!ZZ!OTHER FIRST NAME		EDI field will also include a number at the end that cooresponds the number of other names provided (RQSI!AQ!ZZ!OTHER FIRST NAME1)
Other Middle Name	RQSI!AQ!ZZ!OTHER MIDDLE NAME		EDI field will also include a number at the end that cooresponds the number of other names provided (RQSI!AQ!ZZ!OTHER MIDDLE NAME1)
Other Last Name	RQSI!AQ!ZZ!OTHER LAST NAME		EDI field will also include a number at the end that cooresponds the number of other names provided (RQSI!AQ!ZZ!OTHER LAST NAME1)
Other Suffix Name	RQSI!AQ!ZZ!OTHER SUFFIX NAME		EDI field will also include a number at the end that cooresponds the number of other names provided (RQSI!AQ!ZZ!OTHER SUFFIX NAME1)
SSN	REF!SY!		Answer Format: REF!SY![[SSN]!STUDENT REPORTED SSN\
Date of birth	DMG!D8!		Answer Format: DMG!!D8![[DATEOFBIRTH]![[GENDER]!!!![CITIZENSHIP]!!8\ Date of birth = yyyymmdd
Place of birth (city, state, country)	IND!		United States: • IND!!STATEABBREV!!CITY\ Mexico and Canada: • IND!COUNTRYABBREV!STATEABBREV!!CITY\ All other International Countries: • IND!COUNTRYABBREV!!!CITY\ Answer Format: DMG!!D8![[DATEOFBIRTH]![[GENDER]!!!![CITIZENSHIP]!!8\ Gender: F = Female

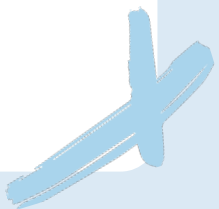


EDI Updates: Mailing & Residential Addresses



Currently, Mailing and Residential Addresses are not passed in the EDI; we are testing an update to include these lines in the future

Field	EDI Line (Current)	EDI Line (Upcoming Updates)
Mailing Address	Not passed	<p>Answer Format:</p> <p>US: N3![Address line 1]![Address Line 2]\ N4![City]![State]![Zip code]!M\ CA/MX: N3![Address line 1]![Address Line 2]\ N4![City]![State]![Zip code]![Country Code]!M\ Other International Address: N3![Address line 1]![Address Line 2]\ N4![City]![Zip code]![Country Code]!M\ Lines not passed if Mailing is same as Permanent</p>
Residential Address	Not passed	<p>Answer Format:</p> <p>US: N3![Address line 1]![Address Line 2]\ N4![City]![State]![Zip code]!C\ CA/MX: N3![Address line 1]![Address Line 2]\ N4![City]![State]![Zip code]![Country Code]!C\ Other International Address: N3![Address line 1]![Address Line 2]\ N4![City]![Zip code]![Country Code]!C\ Lines not passed if Residential is same as Permanent</p>



EDI Updates: Ethnicity & Race



The answer format for the line will not change; we are only updating the logic for users who select 'Prefer not to say'

Field	EDI Line (Current)	EDI Line (Upcoming Updates)
Race	<p>Answer Format: NTE!!Ethnicity=x;Race=y\ "T" : American Indian/Alaska Native "U" : Asian "Q" : Black/African American "V" : Native Hawaiian/Pacific Islande "S" : White/Caucasian</p> <p>If user selects 'Prefer not to say' for both Race and Ethnicity, the line will appear as NTE!!Ethnicity=\ If user selects 'Prefer not to say' for Race but selects an Ethnicity, the line will appear NTE!!Ethnicity=x\ If user selects 'Prefer not to say' for Ethnicity but selects a Race, the line will appear as NTE!!Race=y\ If user selects 'Prefer not to say' for both Race and Ethnicity, the line will appear as NTE!!Ethnicity=\</p>	<p>Answer Format: NTE!!Ethnicity=x;Race=y\ "T" : American Indian/Alaska Native "U" : Asian "Q" : Black/African American "V" : Native Hawaiian/Pacific Islande "S" : White/Caucasian "P": Prefer not to say</p>
Ethnicity	<p>Answer Format: NTE!!Ethnicity=x;Race=y\ Ethnicity R=Hispanic, Latino or Spanish W=not Hispanic, Latino or Spanish</p> <p>If user selects 'Prefer not to say' for both Race and Ethnicity, the line will appear as NTE!!Ethnicity=\ If user selects 'Prefer not to say' for Race but selects an Ethnicity, the line will appear NTE!!Ethnicity=x\ If user selects 'Prefer not to say' for Ethnicity but selects a Race, the line will appear as NTE!!Race=y\ If user selects 'Prefer not to say' for both Race and Ethnicity, the line will appear as NTE!!Ethnicity=\</p>	<p>Answer Format: NTE!!Ethnicity=x;Race=y\ Ethnicity R=Hispanic, Latino or Spanish W=not Hispanic, Latino or Spanish "P": Prefer not to say</p>



EDI Updates: Spoken Languages



Character padding in between languages will be re-introduced to match the legacy format

Field	EDI Line (Current)	EDI Line (Upcoming Updates)
Spoken Languages	<p>Answer Format: RQS!AQ!ZZ!SPOKEN LANGUAGES!![Years of language][Code of language] [Name of language] \</p> <p>If multiple languages are passed, they are included sequentially in the same line: RQS!AQ!ZZ!SPOKEN LANGUAGES!![Years of language][Code of language] [Name of language] [Years of language][Code of language] [Name of language] \</p>	<p>Answer Format: RQS!AQ!ZZ!SPOKEN LANGUAGES!![Years of language][Code of language] [Name of language] \</p> <p>If multiple languages are passed, they are included sequentially in the same line; the code of the second language will begin 30 characters/spaces after the start of the name of language 1</p> <p>Example: RQS!AQ!ZZ!SPOKEN LANGUAGES!!02FR FRENCH 02DE GERMAN\</p>



Thanks y'all!

MY  FUTURE

**Texas Higher
Education**
COORDINATING BOARD

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