



NEW CANEY ISD

TREx

TREx Procedures

2023-2024

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PEIMS Department

Director of Information Systems	Daniel Casteel	ext. 2401
PEIMS Coordinator	Michelle Loth	ext. 2420
PEIMS Assistant Coordinator	Alicia Rawlinson	ext. 2422
PEIMS Clerk	Kristi Bigini	ext. 2421
PEIMS Clerk	Shelly Garcia	ext. 2411
PEIMS Attendance Coordinator	Kristina Wells	ext. 2430
PEIMS Attendance Coordinator	Allie Hernandez	ext. 2436

Records Management

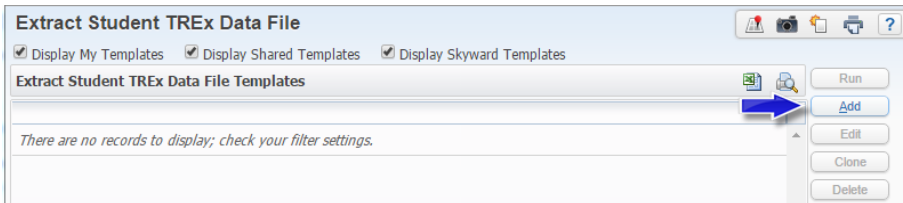
Records Management Officer	Tammy Yarbrough	ext. 2450
Records Specialist	Amy Jaloway	ext. 2452
Records Specialist	Marisa Wieckowski	ext. 2451

Student TReX Data File from Skyward

Extract Student Data from Skyward (Step 1 of 4)

Menu Path: Federal/State Reporting > Texas State Reporting > TReX > TReX > Extract Student TReX Data File

Click the **Add** button to create an Extract template



- A. Template Description:** Name template Step 1 TReX Extract.
 - B. Last PEIMS Submission:** Enter the Last PEIMS submission the student was pulled for. 1 – Fall = from snapshot day to the last day of school year. 3 – Summer = from last day of school to snapshot day.
 - C. Extract Year:** Select **Current Year**
 - D. Local Student ID:** Select **Other**
 - E. Report By Options:** Select By Ranges or By Individual button
- (If selecting By Ranges, Select a specific Student Key or Specific Grade Level as:**

F. Student: Click the Individuals Button, **(see screenshot below)**

1. Enter student's name key or click the **Student** link to search for the student. Select the appropriate student's name.
2. Click the ADD button.
3. Click OK.

G. Under Test Selection: Include all Tests

H. Current Coursework: Expand this section to check **all reporting period boxes.**

I. Transcript: Expand this section to select the following:

J. GPA Method: Select 3 – Official GPA

K. Rank Method: Select 3 – Official GPA

- L. **Send GPA Using:** Select GPA Value
- M. **Include Service IDs from Grading Configuration** should be checked
- N. **Grading Period:** Select Always Use Last Completed
- O. Click the **Student Test Selection** button to select the test scores that should be included in the TReX file.

- P. On next screen, Click the Select ALL Tests button.

Selected	Test	Name	Abbreviation	Edition	Level	Form
<input type="checkbox"/>	SAT	SAT	SAT			
<input checked="" type="checkbox"/>	STAAR	STAAR 3-8	STAAR 3-8	Ed10	GL3	
<input checked="" type="checkbox"/>	STAAR	STAAR 3-8	STAAR 3-8	Ed10	GL4	
<input checked="" type="checkbox"/>	STAAR	STAAR 3-8	STAAR 3-8	Ed10	GL5	
<input checked="" type="checkbox"/>	STAAR	STAAR 3-8	STAAR 3-8	Ed10	GL6	
<input checked="" type="checkbox"/>	STAAR	STAAR 3-8	STAAR 3-8	Ed10	GL7	
<input checked="" type="checkbox"/>	STAAR	STAAR 3-8	STAAR 3-8	Ed10	GL8	
<input checked="" type="checkbox"/>	STAAR	STAAR 3-8	STAAR 3-8	Edt8	GL5	
<input checked="" type="checkbox"/>	STAAR	STAAR 3-8	STAAR 3-8	Edt8	GL8	
<input checked="" type="checkbox"/>	STAAR	STAAR 3-8	STAAR 3-8	Edt9	GL3	
<input checked="" type="checkbox"/>	STAAR	STAAR 3-8	STAAR 3-8	Edt9	GL4	
<input checked="" type="checkbox"/>	STAAR	STAAR 3-8	STAAR 3-8	Edt9	GL5	
<input checked="" type="checkbox"/>	STAAR	STAAR 3-8	STAAR 3-8	Edt9	GL6	
<input checked="" type="checkbox"/>	STAAR	STAAR 3-8	STAAR 3-8	Edt9	GL7	
<input checked="" type="checkbox"/>	STAAR	STAAR 3-8	STAAR 3-8	Edt9	GL8	
<input checked="" type="checkbox"/>	STEOC	STAAR EOC	STAAR EOC	Edt1	9+	R1
<input checked="" type="checkbox"/>	STEOC	STAAR EOC	STAAR EOC	Edt3	EOC	A1
<input checked="" type="checkbox"/>	STEOC	STAAR EOC	STAAR EOC	Edt4	EOC	A1
<input checked="" type="checkbox"/>	STEOC	STAAR EOC	STAAR EOC	Edt6	EOC	A1
<input checked="" type="checkbox"/>	STEOC	STAAR EOC	STAAR EOC	Edt6	EOC	OT

- Q. Uncheck the box for SAT.
- R. Click OK. Then Click the **Save and Run** button. You will receive a message when the process has completed.
Do NOT back out while this is processing, or it will not complete.

Modifying Skyward XML file (Step 2 of 4)

Menu Path: Federal/State Reporting > Texas State Reporting > TReX > TReX > Modify Student Export TReX Data

Enter Student Name Key and select correct Tab on left to Verify.

For Elementary:

- **Verify Discipline:** If **Discipline** records are listed, make sure the **Action End Date** is present. If date is not present, click **Edit** and enter date as tomorrow's date. You must communicate to your discipline officer if end date is not present.

For Secondary:

- **Verify Discipline:** If **Discipline** records are listed, make sure the **Action End Date** is present. If date is not present, inquire with Assistant Principal if Discipline was served or not.
- **Verify Enrollment: CPR Date and Peace Officer Instruction Met Date.** If these dates are not present, click **Edit** and enter the date instruction was completed.

For all grade levels:

- **Verify Home Language Survey Date** in listed. If not, review the students original home language in Laserfiche, use the date the parent signed the form, and enter the date in Skyward under the student profile. For more detail review the Enrollment handbook.
- **Verify under special programs the Dual Lang Immersion Year** is complete. If Dual Lang Immersion Comp Year is completed them Dual lang immersion Language must be completed. Contact your Multilingual department for data elements. For additional questions and understanding contact the PEIMS department.

Home ▾ Students Families Staff Student Services Food Service Office Administration Educator Access Plus Advanced Features Federal/State Reporting Custom Reports Q Search

Back Modify Student Export TReX Data Alerts Student Locator Notes Capture Screen Favorites New Window My Print Queue

Customize Tabs Demographic Special Programs Enrollment Guardians Assessments Immunizations Discipline Current Courses Course History GPA History

Student: [Name] Process Date: 10/30/17 Add Delete

TREX Report Withdraw Form

Discipline Views: General Filters: *Skyward Default Quick Filter Chart Options Export Options Print Browse Add Edit Delete

Action Number	Action Reason	Reason Desc	Action Code	Action Code Desc	Action End Date
1	21	ConCod Violatio	06	InSch Susp<3day	

Save the changes, and **continue to Step 3** for Create Student TReX Download File.

Create Student TReX Download File (Step 3 of 4)

Menu Path: Federal/State Reporting > Texas State Reporting > TReX > TReX > Create Student TReX Download File.

Click the **Add** button to create a Download File template

Create Student TReX Download File

☒ Display My Templates ☒ Display Shared Templates ☒ Display Skyward Templates

Create Student TReX Download File Templates

There are no records to display; check your filter settings.

Print Add Edit Clone Delete

- Template Description:** Name template Step 3 Create TReX.
- Date Extracted:** Enter the date of Step 1 Extract. **(Check the Box to Use Today's Date)**
- Data to be exported:** Select All Data.
- Format Type:** Select Both.

- E. **Current Year GPA History** Send all current Year
 F. Select **By Ranges** button (You can also do this process by individual)

TREx Create Download File

Template Settings

* Template Description:

☒ Share with other users in entity 001

☐ Print Greenbar

Save

Save and Print

Back

Export Options

Low High

* Date Extracted: ?

☒ Use Today's Date

Data to be exported:

Format Type:

Current Year GPA History: ?

Report by Options

☒ By Ranges ☐ By Individual

Student Ranges

Low High

Student Key:

Grd Lvl: ?

Entity Selection

001 - NEW CANEY H S

Asterisk (*) denotes a required field

Click the **Save and Print** button. The **Save and Print** button actually runs the process. You will receive a message when the process has completed. **Do NOT back out while this is processing, or it will not complete.**
Save your PDF into Laserfiche under withdraw

View/Save TReX File (Step 4 of 4)

Menu Path: Federal/State Reporting > Texas State Reporting > TReX > TReX > View/Save TReX File Locally

Use this module to save the TReX file outside of Skyward.

Select/highlight the file and click the **View** button. The file will be downloaded to your downloads folder.

View/Save Locally for TReX Download File State Transfer

Views: General ▾ Filters: *All Files ▾

Date Created ▾	Time Created	Type	Created By	Entity	File Size (KB)	File Name
06/20/2016 Mon	8:43 am	TReX Download File		006	36.58	

View Delete Back

NOTE: This file is the XML Texas Student Record File that will be uploaded FIRST in the TReX system.

Export Student Record File from Laserfiche

Go To: https://forms.newcaneyisd.org/Forms/TREX_Export

TReX Export
www.newcaneyisd.org • 21580 Loop 494 • New Caney, Texas 77357 • Tel. 281-577-8600 • Fax 281-354-1878

Student Information

Student ID* First Name* Last Name* Campus*

Form

By entering the student ID above and submitting this form, I understand I am triggering a process that will export all TReX required documents for this student to a designated network location as a single PDF.

Acceptance & Digital Signature

By typing my legal full name and checking the acceptance box you:

- Accept the rules of this form.
- Agree that all information contained is accurate.
- Confirm that you are the person referenced through out the form and the acceptance section.
- I verify that the above information is true and correct.

Date: 6/21/2017

Employee First & Last Name* Employee ID* Accept*

☐ Accept

Submit

- Enter the Student ID number
- Enter First & Last Name under Employee First & Last Name

- Enter Employee ID number
- Click checkbox for Accept
- Click Submit.

Note: This will create student's file from Laserfiche and will automatically put the file in the K:Drive/TReX/Laserfiche folder as: Last Name, First Name (ID#) TReX. Date.pdf

NOTE: This is the student's cumulative records from Laserfiche. This is the 2nd file to be uploaded in the TReX system.

Records Requests In TReX System

USE ONLY Internet Explorer or Microsoft Edge Browser....

Go To: <https://tealprod.tea.state.tx.us/>

Login to TEA using your TEAL Username and Password

TEA Login (TEAL)

NOTICE: TEA Web Applications will not be available each Sunday morning from 5:00am to 2:00pm due to routine maintenance. Please do not access your applications during this time period. **You could lose data.**

Don't have an account? [Request New User Account](#)

Username:

Password: [Show Password](#)

[Forgot your password?](#)
[Forgot your username?](#)

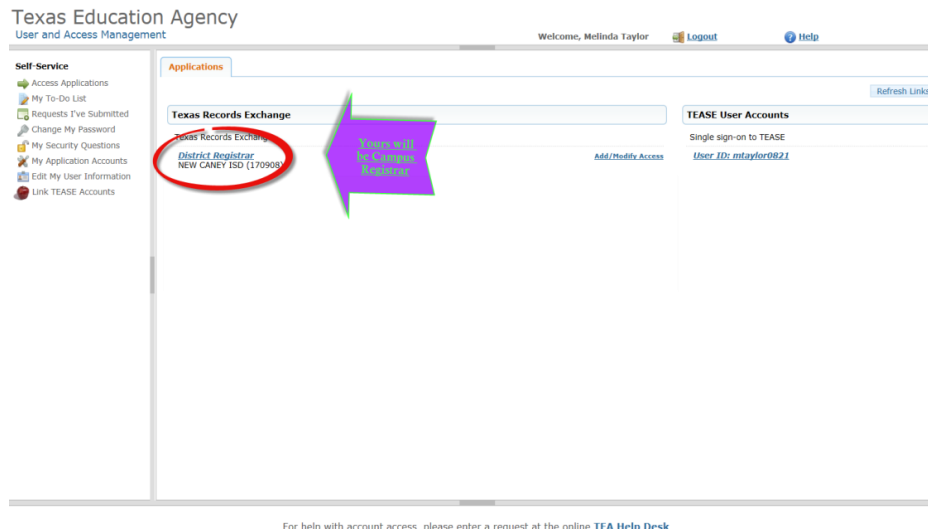
[Help for Request Process](#) | [Help for Educator Account Setup](#)

WARNING: Unauthorized use of this system or its data is prohibited; usage may be subject to security testing and monitoring; misuse is subject to criminal prosecution; and users have no expectation of privacy except as otherwise provided by applicable privacy laws.

For help with account access, please enter a request at the online [TEA Help Desk](#).
[TEA Home Page](#) | [Web Policy and Accessibility](#) | Browsers Supported by TEAL: [IE 9](#), [IE 10](#) and [IE 11](#).
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Select **Campus Registrar** Link for TReX Homepage

Last Updated: August 30, 2023



Overview

If there are Pending Records Requests/Pending Records that have been requested, Rejected Outbound Requests /Rejected Outbound Records/Transcripts, they will be here under Items Requiring Attention.

Click on **Inbound Requests** to see the records being requested for students that have moved to other districts. Click on **Inbound Records/Transcripts** to receive Records that have been requested from other districts. Click on **Rejected Outbound Requests** to see why the request for records to other districts have been rejected. Click on **Rejected Outbound Records/Transcripts** to see why the records sent to other districts have been rejected.



TEC 7.010 requires student records & transcripts be sent electronically, including a student's course or grade completion, teachers of record, assessment instrument results, placement in special education, IEP, and personal graduation plans. Colleges require Exit Level TAKS or STAAR EOC scores, class rank, size, & date, graduation date and diploma type.

The TReX request and record retention periods have been set to allow retentions until August 30, 2017. After that date, requests or records in the TReX system older than 14 days will be purged. Please insure you have fulfilled any requests and printed and/or downloaded all received records before that time to avoid losing these transactions.

Items Requiring Attention

	3	Inbound Requests
	0	Inbound Records/Transcripts
	0	Rejected Outbound Requests
	1	Rejected Outbound Records/Transcripts

[Refresh](#)

Top 10 Record/Transcript Destinations

Records/Transcripts

- Send one record/transcript
- Send multiple records/transcripts
- View pending outbound records/transcripts (15)
- Manage records/transcripts
- View completed transactions

Requests

- Request records/transcripts
- View pending outbound requests (0)

Inbound Requests

The listed students are the records to be extracted and sent within **10 days** of requested date listed. Click Checkbox next to the student's name that records are being sent for and click Fulfill.

NOTE: If Student has never been enrolled at your campus, **look up student in TSDS/UID/Enrollment Tracking to verify if they have attended a NCISD Campus previously. If they have attended a campus in NCISD, Click the Forward button to send the request to the correct campus.** If student has not attended in NCISD, click the Reject button and state reason for rejecting request. ***This should be the ONLY reason to Reject any request!***

Requests sent to

Showing 1-3 of 3

Requested	Urgency	Enroll Date	Status	Last Name	First Name	Student #	TSDS Unique ID	Sent From
06/21/2017 08:57:10 AM	Immediate	01/30/2017	Awaiting fulfillment	TARKINGTON H S, CLEVELAND				
06/21/2017 08:06:47 AM	Immediate		Awaiting fulfillment	PEGASUS SCHOOL, LOOKHART				
05/16/2017 01:04:10 PM	Immediate		Awaiting fulfillment	EISENHOWER H S, HOUSTON				

Buttons: **Fulfill**, **Forward**, **Hold for Grades**, **Reject**, **Done**

Select a student record/transcript to match the request

Any differences between the requested and selected students are highlighted in yellow.

Requested Student

Selected Student

(Please select the record/transcript to be sent.)

Available Students

TReX found no records matching the request. You may search through all uploaded records or upload additional records.

Matching Records/Transcripts

Search for a Record/Transcript

Showing 1-10 of 159

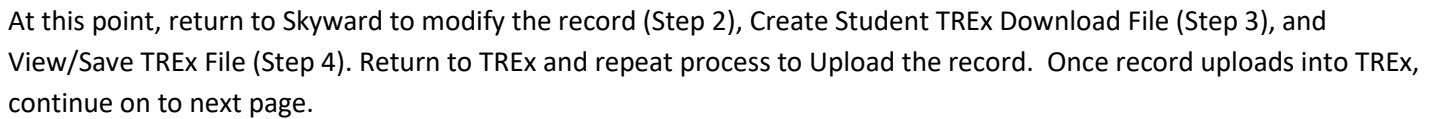
Last Name	First Name	Middle Name	Suffix	Gender	Date of Birth	Student #	TSDS Unique ID	Uploaded	View	Attachments
Acosta	Alma			Female	11/21/1998	000000000000	000000000000	06/08/2017 06:25:30 PM	PDF	Add attachment
Acosta/Reyes	Yamir			Female	07/10/1999	000000000000	000000000000	06/08/2017 06:25:38 PM	PDF	Add attachment
Adams	Phyllis	Christine		Female	06/10/1999	000000000000	000000000000	06/08/2017 06:25:44 PM	PDF	Add attachment
Adams	Christine			Female	06/10/1999	000000000000	000000000000	06/08/2017 06:25:50 PM	PDF	Add attachment
Adams	Christine			Female	06/10/1999	000000000000	000000000000	06/08/2017 06:25:55 PM	PDF	Add attachment
Adams	Christine			Female	06/10/1999	000000000000	000000000000	06/08/2017 06:26:08 PM	PDF	Add attachment
Adams/Reyes	Christine			Female	06/10/1999	000000000000	000000000000	06/08/2017 06:26:14 PM	PDF	Add attachment
Adams	Christine			Female	06/10/1999	000000000000	000000000000	06/08/2017 06:26:21 PM	PDF	Add attachment
Adams	Christine			Female	06/10/1999	000000000000	000000000000	06/08/2017 06:26:29 PM	PDF	Add attachment
Adams/Reyes	Christine			Female	06/10/1999	000000000000	000000000000	06/08/2017 06:26:40 PM	PDF	Add attachment

Buttons: **Cancel**, **Upload**, **Next >>**

To upload the Texas Student Record XML file (the 1st file extracted from Skyward and saved) click **Matching Records/Transcripts**, then click **Upload** at bottom of screen, click **Browse** to select file from your downloads folder.

File will be named as: Last 4 of student Social/Last Name First Name stu

NOTE: There can be many different error messages. If XML file will not upload in TREx , see the error message as below and click on the Expand ALL and click the + sign below it to read the error message for what needs to be corrected.



TRex Record Creation/Adding Attachments

Click Browse to select file from **K:Drive/TREx/Laserfiche** folder. This is the TREx Export file requested on the Laserfiche webform. The file will be named as: Last Name, First Name (ID#)-TREX-YYYY.MM.DD

Any differences between the requested and selected students are highlighted in yellow.



TREx found no records matching the request. You may search through all uploaded records or upload additional records.

Last Updated: August 30, 2023

SPED Records: For students that have Special Education Records: Request the records from Special Education via email to Jacqueline Smith (jsmith6@newcaneyisd.org) and Alice Grevemberg (agrevemberg@newcaneyisd.org). They will put the records in the Special Education folder on the K:Drive for the campus to be sent via TReX with the Cumulative record.

HB 4545 Records: Campuses should work with internal staff to obtain the Supplemental Accelerated Instruction Hours Form and load the form as an additional attachment to be sent via TReX with the cumulative record.

HB 3 Records: Threat assessment records are separate from the child's discipline records. Any threat assessment conducted or in the process of being conducted will need to be included in the TReX transfer as an additional attachment. (Threat assessments will be included in the Laserfiche extract)

Review Details of Request Fulfillment

1. Select Record/Transcript **2. Confirm and Submit** **3. Review**

Review the details of this request fulfillment

When you click the "Send" button below, TReX will translate the data into the requesting Institution's preferred format and send the record/transcript. On the next screen, TReX will provide a unique tracking number for the delivery.

Any differences between the requested and selected students are highlighted in yellow.

Requested Student				
Name	Gender	Date of Birth	Student #	TSDS Unique ID
Student # 1234567	Female	11/15/2005		

Selected Student					
Name	Gender	Date of Birth	Student #	View Attachments	Program Type
Student # 1234567	Female	11/15/2005	123456789	PDF	Foundation

Requesting Institution	
Name	Address
TARKINGTON H S	2770 FM 163, CLEVELAND, TX, 77327

Enter a message to be sent with the record/transcript (optional)

Characters remaining: 200

☐ By clicking the Send button below, the registrar responsible for this record indicates their intention to sign this form and acknowledges that this electronic signature has the same force and effect as the use of a manual signature.

Cancel << Previous **Send** >>

Verify name of Requested Student and Selected Student are the same, click the **checkbox** as the registrar, and click **Send**.

The records are sent to the requesting district. When records have been **accepted** by the requesting district, the TReX details will be saved under **Completed Transactions**. **Print the acceptance page** from completed transactions to **Laserfiche** as documentation that the records were accepted. Right-click and select print from the screen, and Print to

Laserfiche Snapshot. Once records are accepted and documentation is saved in Laserfiche, you can update the withdraw code in Skyward to L80.

It is the registrar's responsibility to review all documents before sending to the other district. If records with other student information is in the Laserfiche upload, contact Laserfiche to have them removed from the students cumulative folder.

Receiving Inbound Records/Transcripts

Click on Inbound Records/Transcripts Link and right-click on **PDF** link to the right of the screen. Select Print, and print into Laserfiche as the Texas Student Record. Then click on **Attachments** Link, it will open a box with all of the attachments from the other district. Right-click and select open in new window to view the records received. Review that all records have been received before Accepting/Rejecting the file. After verification, print file to Laserfiche as Other School District Information.

Click the check box beside the student's name and click **Accept** to accept the records. **If records are not complete, resend request with notes for what is still needed and be specific. Do not reject the records received whether incomplete or not. Accept records received and resend request for specific records still needed.**

NOTE: ALL RECORDS REQUESTS ARE TO BE COMPLETED WITHIN 10 DAYS OF DATE REQUESTED.

IF THERE HAS BEEN NO ACTIVITY IN 3 DAYS OF A RECORDS REQUEST OR RECEIVING OF A RECORD/TRANSCRIPT, THERE IS AN AUTOMATIC EMAIL FROM TREX. THIS EMAIL ALSO GOES TO THE PEIMS DEPARTMENT.

IF THERE HAS BEEN NO ACTIVITY IN 10 DAYS, THE EMAIL WILL GO TO THE SUPERINTENDENT.

PLEASE BE SURE TO CHECK TREX EVERYDAY SO THAT THESE EMAILS ARE NOT GENERATED.

Completing the Special Circumstances Form

Once records are viewed, saved in Laserfiche and accepted in TReX, the registrar will complete or update the Special Circumstances form in Laserfiche Forms. This form may begin when a student is registered.

Additional Training and TEA Data Standards

To access more training documents and tutorials for using the TReX database, please visit:

[https://tea.texas.gov/Reports and Data/Data Submission/Texas Records Exchange \(TReX\)/TReX Training/](https://tea.texas.gov/Reports_and_Data/Data_Submission/Texas_Records_Exchange_(TReX)/TReX_Training/)

To access TEA's TReX data Standards, please visit:

<https://tea.texas.gov/reports-and-data/data-submission/texas-records-exchange-trex/trex-data-standards>