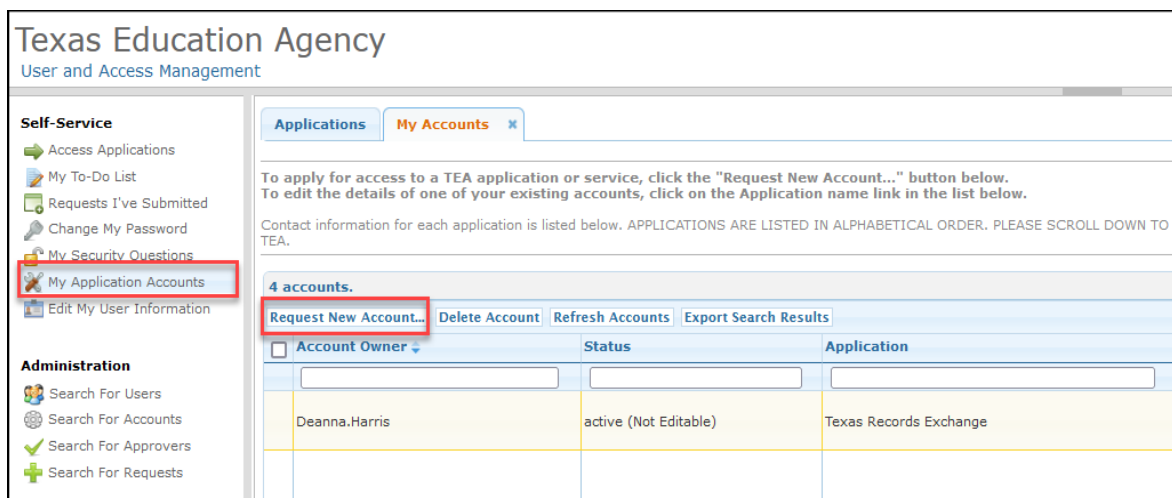


Quick Reference Guide

- A TEAL account with TREx access rights is required.




- Firefox is the recommended browser.
- When naming your scanned documents to attach to a file, do not use punctuation. An example of a file name would be: Jones_E.pdf.
- Make note of the alerts at the top of the TREx home page. A few examples of postings are:
 - 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.
 - IMPORTANT UPDATE! TREx Users – The technical issue has been solved. You may re-submit your undelivered transcripts to colleges. If any records do not process, please re-export the file from you SIS vendor and resend. If you have any further questions, please create a ticket in the TREx Support Portal.
 - Student Attendance Account Handbook (SAAH) changes coming for 23-24 school term.
PC - Pending final approval.

SAAH Section 3.4.4 (HB 3)

When a student moves from one Texas public school district or charter school to another, the student record must be transferred via TREx within 10 working days of receiving a request. The student record must include the following information at a minimum:

- Texas Unique ID
- Social Security number or state-approved alternate ID last reported through TSDS PEIMS
- first, middle, and last name and generation code, if applicable
- date of birth
- gender
- **discipline record**
- **behavioral threat assessment conducted under Section 37.115, if applicable**



SAAH Section 3.3.2 District Responsibility to Secure Records

The Family Education Rights and Privacy Act (FERPA) provides, subject to conditions set forth in 34 CFR § 99.34, a school district may disclose education records, without parent consent, to another district in which a student seeks or intends to enroll, or where the student is already enrolled so long as the disclosure is for purposes related to the student’s enrollment. See 34 CFR § 99.31(a)(2).



CFR – Code of Federal Regulations

ITEMS REQUIRING ATTENTION

- From the main menu page review the **Items Requiring Attention**
 - Inbound Requests – Request for records from another school
 - Inbound Records/Transcripts – Incoming records a school has sent you.
 - Rejected Outbound Requests – Requests you have made that another school has rejected.
 - Rejected Outbound Records/Transcripts – Records you have sent to a school that have been rejected by the school. This usually happens when the record is incomplete, or the wrong record was sent in error.
- From the home page **Items Requiring Attention** area, click on the **Inbound Requests**. Place a check in the box to the left of the student’s name and select **Fulfill**. Be sure to click on **Details**. This is a message instructing you about what has been requested by the new school. When filling the request, include all items asked for.

The screenshot shows the TREx web interface. At the top, there is a header with the Texas Education Agency logo and 'TREx Texas Records Exchange System'. Below the header, there is a search bar and a 'SCHOOL Campus | Logout' link. A notification banner states: '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.' Below this, another banner says: '***ATTENTION TREX USERS: Notification emails and Record and Request windows have been paused for Summer break. No emails will be sent and all records and requests will be retained from now until later this summer. If you have any further questions, feel free to create a ticket in the TREx Support Portal or contact trex@tea.texas.gov ***'. The main content area is divided into several sections: 'Items Requiring Attention' (highlighted with a red box) with a list of 1 Inbound Requests, 0 Inbound Records/Transcripts, 0 Rejected Outbound Requests, and 1 Rejected Outbound Records/Transcripts; 'Records/Transcripts' with options to send one or multiple records/transcripts, view pending outbound records/transcripts (24), manage records/transcripts, and view completed transactions; 'Requests' with options to request records/transcripts and view pending outbound requests (2); 'Reporting' with options for top 10 record/transcript destinations, top 10 request sources, top 10 request destinations, campus activity summary, and transaction status report; and 'Administration' with an option to upload a student record cover sheet. At the bottom, there is a footer with documentation and support information.

- **Fulfill** – Selecting this option means that you are ready to upload the student record and send to the new school.
- **Forward** – Forward the file request to the correct campus, as the requester sent it to your campus in error.
- **Hold for Grades** – You may hold the request until cycle or semester grades are ready
- **Reject** – You may reject the request if the student has never attended your school. A reason message is required. After you enter the reason, click **OK**. If you reject the file due to missing information, be sure that you download what the school sent you first. A partial file is better than no record at all.

- After selecting the option, and in this case fulfill, TREx will move to the next screen where you are able to browse your computer and upload the file extracted from your software.

Fulfill a request from SIVELLS BEND EL

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

Select a student record/transcript to match the request

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

| Requested Student | | | | |
|-------------------|--------|---------------|------------|----------------|
| Name | Gender | Date of Birth | Student # | TSDS Unique ID |
| Doe, Jane | Female | 05/26/2009 | 63021-1436 | |

| Selected Student | | | | | | |
|------------------|--------|---------------|-----------|------|-------------|--------------|
| Name | Gender | Date of Birth | Student # | View | Attachments | Program Type |
| Doe, Jane | Female | 05/26/2009 | | PDF | | |

Available Students

TREx found 1 partial match for the request. You may select the record/transcript shown below, search through all uploaded records, or upload additional records.

| Matching Records/Transcripts | | | | | | | | | |
|------------------------------|-----------|-------------|--------|--------|---------------|-----------|----------------|------------------------|-------------------------------------|
| First Name | Last Name | Middle Name | Suffix | Gender | Date of Birth | Student # | TSDS Unique ID | Uploaded | |
| Doe | Jane | | | Female | | | | 08/01/2022 12:46:06 PM | View PDF Attachments Add attachment |

Cancel Upload Next >>

- Attachments – You can upload a single .pdf file or upload a zip file containing multiple documents.

Fulfill a request from SIVELLS BEND EL

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 |
| Doe, Jane | | 05/26/2009 | | |

| Selected Student | | | | | | |
|------------------|--------|---------------|-----------|------|-------------|--------------|
| Name | Gender | Date of Birth | Student # | View | Attachments | Program Type |
| Doe, Jane | | 05/26/2009 | | PDF | | |

Requesting Institution

Name: SIVELLS BEND EL
Address: 1053 CR 403, GAINESVILLE, TX, 76240-9307

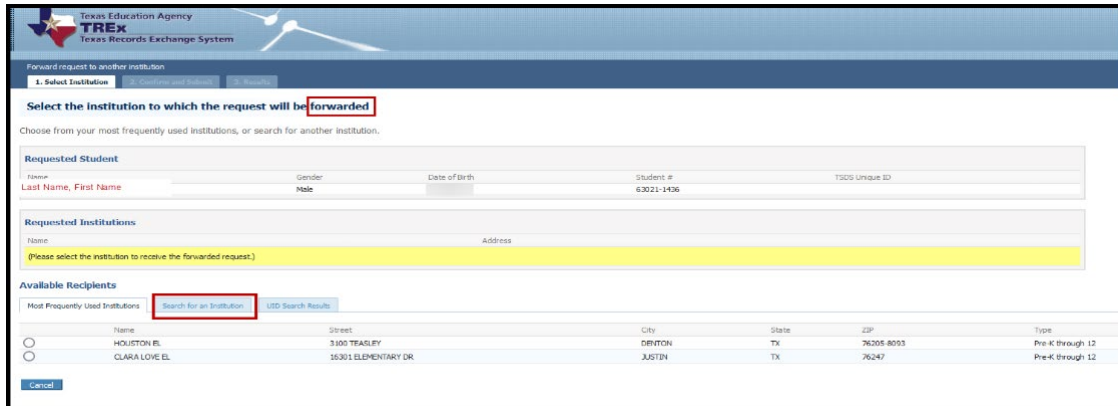
Enter a message to be sent with the record/transcript (optional)

Type your message to the new school. You could let them know your contact phone number and/or email address. You could also mention anything you feel the new school needs to know. 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.

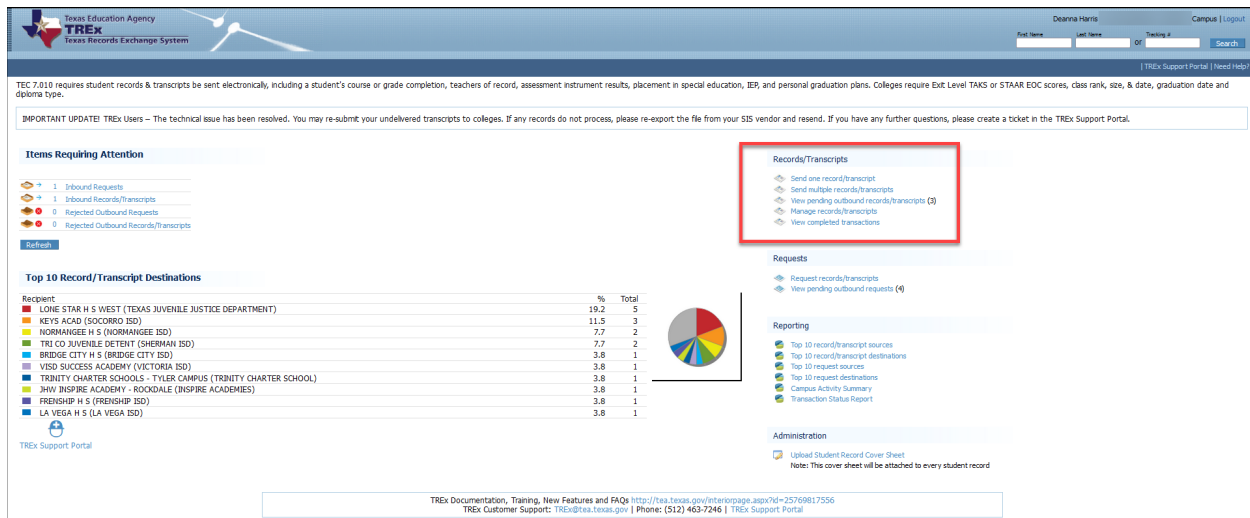
Cancel << Previous Send

- Example of a **forwarded** record – Select the campus you would like to forward the request to.



Records/Transcripts

- Send One Record/Transcript - You may have a situation where you need to send a transcript for a student without a TREx request. Your counselor may ask you send a transcript, or a student may contact your school to send one. In this case, click on the **Send one record/transcript**. TREx will take you to a screen where you are able to upload the extracted file from your SIS.
- Send Multiple Records/Transcripts
- View pending outbound records/transcripts – The number of pending outbound records you have sent.
- Manage Records/Transcript – You are to view and manage records sent. This area allows you to download the PDF and attachments. This area is also used to download the immunization file for each student and upload to your SIS. Your nurse will thank you!
- View Completed Transactions – Click on the PDF to view the record sent.



Send One or Multiple Records

The screenshot shows the 'Select Record/Transcript' step in the TREx system. A student record for 'Doe, Jane' is selected. Below this, a table of available students is displayed. A yellow callout box points to a PDF attachment icon in the table, stating 'This is the Transcript PDF you just uploaded.' Another yellow callout box points to the 'NEXT >>' button, stating 'Click next when you are ready'.

| Selected Student | Name | Gender | Date of Birth | Student # | View | Attachments | Program Type |
|------------------|-----------|--------|---------------|-----------|------|-------------|--------------|
| | Doe, Jane | Female | | | PDF | | Foundation |

| Available Students | Last Name | First Name | Middle Name | Suffix | Gender | Date of Birth | Student # | TSDS Unique ID | Uploaded | View | Attachments |
|----------------------------------|-----------|------------|-------------|--------|--------|---------------|-----------|----------------|------------------------|------|----------------|
| <input checked="" type="radio"/> | Doe | Jane | | | Female | 01/05/1998 | | | 06/15/2022 09:37:59 AM | PDF | Add attachment |
| <input type="radio"/> | | | | | Male | | | | 06/15/2022 09:37:52 AM | PDF | Add attachment |
| <input type="radio"/> | | | | | Female | | | | 06/15/2022 09:37:42 AM | PDF | Add attachment |
| <input type="radio"/> | | | | | Male | | | | 08/17/2022 11:54:43 AM | PDF | 1 attachment |
| <input type="radio"/> | | | | | Female | | | | 06/15/2022 09:37:31 AM | PDF | Add attachment |
| <input type="radio"/> | | | | | Female | | | | 06/15/2022 09:37:23 AM | PDF | Add attachment |
| <input type="radio"/> | | | | | Female | | | | 06/15/2022 09:37:17 AM | PDF | Add attachment |
| <input type="radio"/> | | | | | Male | | | | 08/12/2022 12:46:06 PM | PDF | 2 attachments |
| <input type="radio"/> | | | | | Female | | | | 06/15/2022 09:37:09 AM | PDF | Add attachment |
| <input type="radio"/> | | | | | Female | | | | 06/15/2022 09:37:03 AM | PDF | Add attachment |

- Click on browse, search your computer for the student transcript record from your SIS and upload. You will now see your student listed in the available student area.
- Click NEXT to proceed to the page where you will select the institution of higher learning or school. Put your cursor to the left of the school's name and hit **SELECT**, and then NEXT. Your screen will forward to a verification page. Click SEND.

Requests

- Request records/transcripts – Use this area when you need to obtain records for a student who has enrolled with your district.

The screenshot shows the TREx dashboard. The 'Items Requiring Attention' section shows 3 Inbound Requests, 0 Inbound Records/Transcripts, 0 Rejected Outbound Requests, and 1 Rejected Outbound Records/Transcripts. The 'Records/Transcripts' section shows options to send one or multiple records/transcripts, view pending outbound records/transcripts (24), manage records/transcripts, and view completed transactions. The 'Requests' section is highlighted with a red box, showing 'Request records/transcripts' and 'View pending outbound requests (2)'. The 'Top 10 Record/Transcript Destinations' table shows SIVELLS BEND EL (SIVELLS BEND ISD) and NORTH CENTRAL TEXAS COLLEGE.

| Recipient | % | Total |
|------------------------------------|------|-------|
| SIVELLS BEND EL (SIVELLS BEND ISD) | 50.0 | 1 |
| NORTH CENTRAL TEXAS COLLEGE | 50.0 | 1 |

Request Records continued

- The fields marked with an asterisk are required when requesting a record.
- Click next where you will select the institution you are requesting from.
- Verify that you have the correct student listed on your request.
- Select the Institution tab and enter the school's name.
- You may also use the UID Search to locate the last school the student attended. This information is only as good as the information in UID. Keep in mind that the last school could be a different campus depending on grade. For example, the student changed schools with grade advancement.
- Enrollment History – Select view to give you more information about the student's enrollment history.

Request a record/transcript from other institutions | TREx Support Portal | Need Help?

1. Enter Student Information | 2. Select Institution | 3. Confirm and Submit | 4. Results

Enter identifying information about the student whose record/transcript is being requested

Required fields are marked with an asterisk (*). Enter as much information as possible to facilitate the record lookup on the receiving end.

Requested Student

*First Name: Gender:

Middle Name: *Date of Birth:

*Last Name: Student #:

Suffix: TSDS Unique ID:

Urgency

Select the urgency of this request: Enrollment Date at New Campus:

Texas Education Agency
TREx
Texas Records Exchange System

User Name: School Name: Logout

First Name: Last Name: or Tracking #: Search

Request a record/transcript from other institutions | TREx Support Portal | Need Help?

1. Enter Student Information | 2. Select Institution | 3. Confirm and Submit | 4. Results

Select the institutions from which the record/transcript is to be requested

Choose from your most frequently used institutions, or search for another institution.

Requested Student

| Name | Gender | Date of Birth | Student # | TSDS Unique ID |
|---------------|--------|---------------|-----------|----------------|
| Doe, Jane Sue | | 01/01/2009 | | |

Requested Institutions

| Name | Address |
|---|---------|
| (Please select the institutions from which the record/transcript is being requested.) | |

Available Reckinlets

Showing 1-1 of 1 | Page 1 of 1

Hide Search Results or, in search, enter text in one or more fields and press Enter. Wildcards (*) are allowed in the First, Last, and Middle Name fields.

| First Name | Last Name | First Name | Last Name | Suffix | Gender | Date of Birth | SSN | TSDS Unique ID | Last Institution Name | Last Institution Address | Enrollment History |
|------------|-----------|------------|-----------|--------|--------|---------------|-------|----------------|-----------------------|----------------------------------|-------------------------------------|
| Jane | Sue | Doe | | | | 01/01/2009 | | | S AND S CONS BL | P O BOX 837, SAULSBY, TN294-0837 | <input type="button" value="View"/> |
| Select | Jane | Sue | Doe | | MALE | 01/01/2009 | ***** | | | | |

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Request a record/transcript from other institutions | TREx Support Portal | Need Help?

1. Enter Student Information | 2. Select Institution | 3. Confirm and Submit | 4. Results

Review the details of this request

When you click the "Send" button below, TREx will send the request to the selected institution. On the next screen, TREx will provide a tracking number for the request.

Requested Student

| Name | Gender | Date of Birth | Student # | TSDS Unique ID |
|----------------|--------|---------------|-----------|----------------|
| Harris, Deanna | | | | |

Requested Institutions

| Name | Address |
|------------|--------------------------------------|
| 3D ACADEMY | 116 N 10TH ST, DOWNA, TX, 78537-2799 |

Urgency

The urgency of this request is immediate. Enrollment Date at New Campus:

Enter a message to be sent with the request (optional)

Type a note to the district. Characters remaining: 172

Request Records Continued

- View the requests sent from your school to another district.

Requests sent from

Showing 1-4 of 4

Search Fields to search for items in the list. [Page 1 of 1] Show 10 per page

| Requested | Urgency | Email Date | Status | Last Name | First Name | Student # | TSOS Unique ID | Sent To | |
|---|-----------|------------|----------------------|-----------|------------|-----------|----------------|---------------------------|---------|
| <input type="checkbox"/> 06/30/2022 03:00:31 PM | Immediate | | Awaiting fulfillment | | | | | JUVENILE DETENTION CENTER | Details |
| <input type="checkbox"/> 06/30/2022 03:57:45 PM | Immediate | | Awaiting fulfillment | | | | | KITTY HAWK MIDDLE | Details |
| <input type="checkbox"/> 06/22/2022 12:30:42 PM | Immediate | | Awaiting fulfillment | | | | | WACD # 5 | Details |
| <input type="checkbox"/> 06/22/2022 12:29:13 PM | Immediate | | Awaiting fulfillment | | | | | G W CARVER MIDDLE | Details |

All times in local time zone

Submit Done

Reporting

- This area gives you valuable information on your record requests and those that have been filled depending on the parameters selected.

Reporting

- Top 10 record/transcript destinations
- Top 10 request sources
- Top 10 request destinations
- Campus Activity Summary
- District Activity Summary
- Transaction Status Report**

Texas Education Agency
TREx
Texas Records Exchange System

Display transaction status report

Select the report options and press Submit.

Institution: All Institutions
Time Period: Today

Deliveries and Requests
With State: Show All

Options
Grouping By: Receiving Institution
Sort By: Student Name
Report Format: PDF

Submit Done

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Transaction Status Report by Organization for YOUR SCHOOL NAME

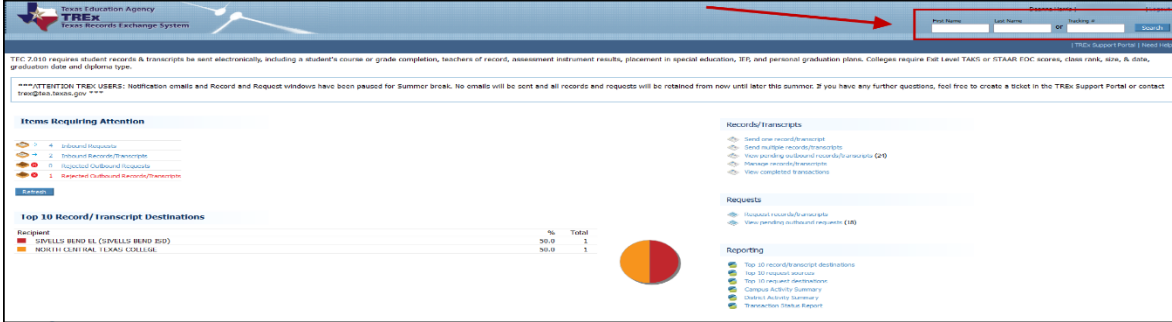
Period Covered: 07/01/2022 12:00 to 08/15/2022 01:45
Date Generated: 08/15/2022 01:45
Transaction: 1 transcript, 6 record requests
Total Institutions: 4
Total Transactions: 7

| Last Name | First Name | Middle | SS # | Status | Status Date | Sender ID | Recipient | Tracking | Type |
|---|------------|--------|-------|----------------------|------------------------|-----------|-----------|----------|------------|
| Receiving Institution: CLARA LOVE EL | | | | | | | | | |
| | | | ***** | Awaiting fulfillment | 07/20/2022 08:20:00 AM | | | | Record |
| Transactions: 1 | | | | | | | | | |
| Receiving Institution: SCHOOL | | | | | | | | | |
| | | | ***** | Awaiting fulfillment | 08/06/2022 04:25:27 PM | | | | Record |
| | | | ***** | Fulfilled | 08/01/2022 12:46:55 PM | | | | Record |
| | | | ***** | Awaiting fulfillment | 08/11/2022 04:51:14 PM | | | | Record |
| | | | ***** | Cancelled | 08/10/2022 04:19:46 PM | | | | Record |
| Transactions: 4 | | | | | | | | | |
| Receiving Institution: HOUSTON EL | | | | | | | | | |
| | | | | Awaiting fulfillment | 07/20/2022 08:18:38 AM | | | | Record |
| Transactions: 1 | | | | | | | | | |
| Receiving Institution: NORTH CENTRAL TEXAS COLLEGE | | | | | | | | | |
| | | | | Transferred | 08/01/2022 12:44:29 PM | | | | Transcript |
| Transactions: 1 | | | | | | | | | |

08/15/2022 01:45 PM Page 1 of 1

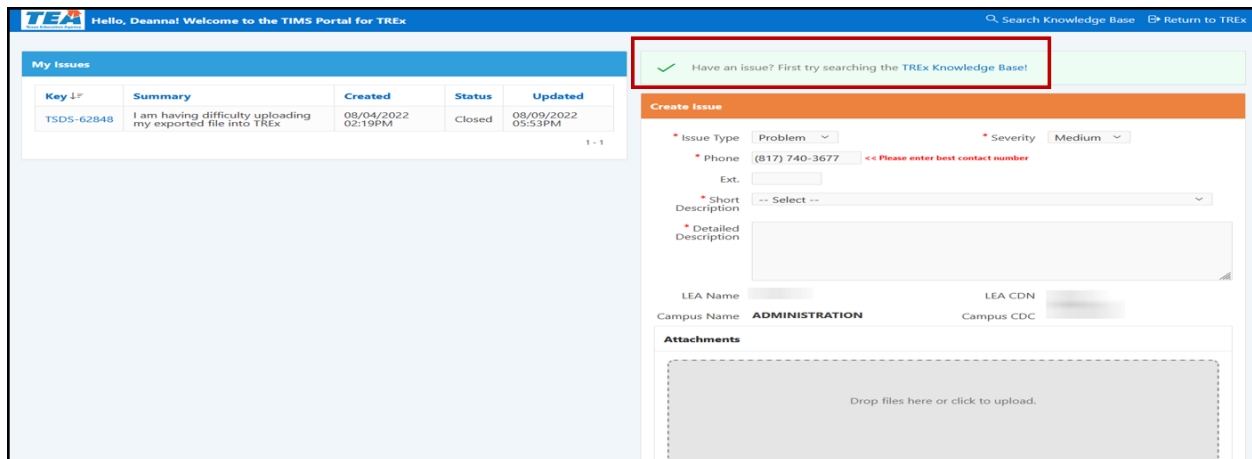
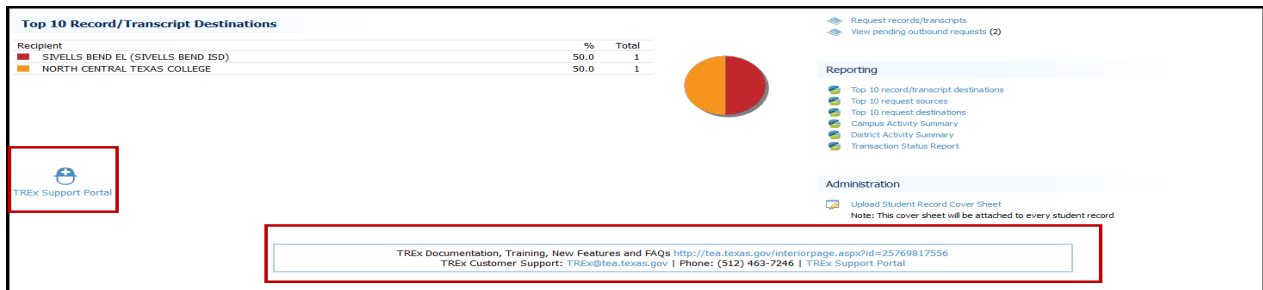
TREx Search Feature

- You may search for a student at the top right. This will show if a record has been requested, or if one has already been filled. Enter the student name and click on search. Information will generate detailed information on dates of requests and records filled.



Additional Resources

- TREx has a support portal. It operates similarly to how TIMS tickets work on TSDS. You can gain access to the portal link from the TREx home page. You are also able to search the TREx Knowledge Base (KB) articles.



TEA Hello, Deanna! Welcome to the TMS KB Search Page Create an Issue deanna.harris@esc11.net Return to TREx

About
Welcome to the TSDS KB Search!

Go Rows 50

| Key | Article Name | Created | Updated |
|------------|--|------------|------------|
| TSDSKB-626 | TREx: Guide for Deleting TREx Accounts for Superintendents/Admins | 03/02/2022 | 05/11/2022 |
| TSDSKB-625 | TREx: Modifying existing TREx access | 03/01/2022 | 05/11/2022 |
| TSDSKB-624 | TREx: Severity Levels | 02/24/2022 | 05/11/2022 |
| TSDSKB-623 | TREx: Requesting TREx Access | 02/23/2022 | 05/11/2022 |
| TSDSKB-581 | TREx: Error File Uploaded Successfully with Warnings | 03/07/2019 | 02/23/2022 |
| TSDSKB-580 | TREx: Unable to find a school listing in TREx to send requests | 03/07/2019 | 02/11/2022 |
| TSDSKB-579 | TREx: Reminders are sent to an employee who is no longer with the district | 03/07/2019 | 01/20/2021 |
| TSDSKB-578 | TREx: Unable to open .PDF attachment in Google Chrome | 03/07/2019 | 02/23/2022 |
| TSDSKB-574 | TREx: Create a TMS ticket within the TREx Application | 01/08/2019 | 01/20/2021 |

1 - 9

- TREx Documentation, Training, New Features and FAQs are located on the TEA link provided on the TREx homepage. [The TREx Data Standards](#) are on the website as well.

Popular Applications AskTED ECOS for Educators Grant Opportunities Secure Applications TEAL Login TSDS Help Desk

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Texas Records Exchange (TREx)

[TREx Home](#) | [TREx Data Standards](#) | [Training Materials](#) | [New Features](#) | [Support Matrix](#)

The Texas Records Exchange (TREx) system is a web-based software application designed for the exchange of electronic student records as mandated by the 79th Legislature, 3rd Called Session, 2006 (House Bill 1). Using the TREx application, school registrars can electronically request and receive student records for students who have attended or will be attending Texas public schools. High school registrars and counselors can electronically create and send official student transcripts to Texas public colleges and universities using TREx to access the SPEEDE server.

To contact TREx Customer Support call (512) 463-7246 or email TREx@tea.texas.gov.

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[Data Reporting Compliance](#)

[District Reporting Schedule](#)

PEIMS

[State Performance Plan](#)

Texas Records Exchange (TREx)

[Data Standards - 2018-2019](#)


[Data Standards - 2017-2018](#)

[Texas Student Data System](#)

[f](#) [t](#) [v](#) [i](#)

Administration

Administration

 [Upload Student Record Cover Sheet](#)
Note: This cover sheet will be attached to every student record

- Under the administration tab, a campus or district registrar has the ability to upload a cover letter that will precede each student record sent. The cover letter can be set for each campus of the district.

ESC Region 11 grants permission to attendees of this session to reproduce and distribute designated resources and materials provided during the presentation.