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THECB

CBPass

THECB uses the CBPass security management system to provide user access to the EDC Portal application. You must register with CBPass to access this application.

One individual from each institution will be designated as the **CB Delegate**. This person will be able to approve access to the EDC Portal via CBPass for each additional user. More information for CB Delegates can be found in the **EDC Portal Delegate Guide**.

If you already have a CBPass account, you may skip this section and follow the instructions under **Requesting Access to the EDC Portal**.

To access CBPass, please follow these instructions.

1. Click on this link to go to the CBPass page:
   
   [https://www1.thecb.state.tx.us/CBPass/](https://www1.thecb.state.tx.us/CBPass/)

2. Select the link to create a new account.

3. The CBPass – New User Registration page displays.

4. Enter your First and Last names.

5. Enter your Affiliation or Type Other – Your institution’s full name.

   **Note:** The affiliation field shows institutions in our database as you type. Avoid typing “the” as the first word of your affiliation. Be specific in entering your institution’s full name in the affiliation field. For example, if your institution has multiple campuses, enter the full name, such as University of Houston - Downtown. Your e-mail address will become your login name for the application.

6. Enter your Physical Address.

7. Enter your Telephone Number.
8. Enter your E-mail Address.

9. Enter your User Name – Used at login.

10. Enter your Password – Used at login.

   Note: Passwords must be at least eight characters in length and contain at least three of the four following attributes:
   - an uppercase letter
   - a lowercase letter
   - a number
   - a special character

11. Enter the answer to the security math problem.

12. Check that you agree to the CBPass Account Agreement.

13. You must agree to the CBPass Account Agreement.

14. Click Register.

After you click the register button, you will also receive an acknowledgement e-mail. Note: If you do not receive the e-mail notification in a timely manner, please check your junk e-mail folder for this message.
15. Select three security questions to answer for password reset purposes. If you would like a different selection of questions to choose from, Click **Generate a new list of questions**. Once you have selected three questions, click **Continue**.

**Important**: All users must select and answer three security questions. Failing to do this will cause issues resetting your password in the future.

Please select 3 of the security questions below to be used for password reset and personal identification purposes:

- [ ] What was the name of your first stuffed animal?
- [x] What is the first name of the boy or girl that you first kissed?
- [ ] In what city did you meet your spouse/significant other?
- [x] What school did you attend for sixth grade?
- [ ] What is your oldest brother’s birthday month and year? (e.g. January 1900)
- [ ] Where were you when you first heard about 9/11?
- [ ] What is the name of a college you applied to but didn’t attend?
- [ ] In what city or town was your first job?
- [ ] In what city or town did your mother and father meet?
- [ ] What is your maternal grandmother’s maiden name?

[Continue]  [Generate a new list of questions]

16. Answer the security questions you chose and click Continue to create your account. Click Cancel to go back to the list of security question.

**What is the first name of the boy or girl that you first kissed?**  John

**What school did you attend for sixth grade?**  King Middle School

**In what city or town was your first job?**  Austin

[Continue]  [Cancel]

17. Save your entries.

18. You may now access the desired THECB application using your current login name and password.
Request Access to the EDC Portal

When you log in to your CBPass account, the My Access tab appears. From this page, you can request access to an application. You can also search and view the current applications to which you have access.

1. Click on the MyAccess tab and then Click to Request Access to another application.

2. The request access window opens. Scroll through the Select Application dropdown list and select EDC Portal.

3. Click Request Access. The system acknowledges your request and adds it to your access list with the status of Requested. This is the same process for CBDelegates as well as other users.

4. Once processed, you will receive an email stating your request status. For most users, access will be granted by the “CB Delegate” from your institution. If granted, you may then open the application by clicking on the application in the table on the My Access tab or by directly going to the application URL and logging in with your CBPass account.
If you have forgotten the password to your account, you can reset your password in a few simple steps.

1. Go to the CBPass login page.
2. Click forgot your password?

3. Enter your email, affiliation, and zip code. Hit continue.
4. Enter the answers to the questions you chose when you first registered.
5. Click Continue and the system sends an email to your email address with an access code you will need to reset your password. Note that this password is only good for 30 minutes. You must then request another
6. Go to your email address inbox and click on the email from Mailbot@thecb.state.tx.us. Note: If you do not see the email, check your spam box.
7. Click on the link in the email. It will take you to password reset page.

8. Enter the Access Code in the email in the Access Code field along with your new password in the appropriate fields. Note: Access Code is only good for 20 minutes.
9. Click Continue. You will be taken to the CBPass login page and you may now log in with your new password.
Accessing EDC Portal

Once you have been granted access to the EDC Portal by the CB Delegate from your institution, you can log into CBPass and select **My Access** on the top left of the screen.

And select the application **EDC Portal**.

This will bring up the welcome screen where you can select to either submit a report or view submission results by selecting the **Reports** drop down menu.
Submit a Report

Under the Reports dropdown menu, select Submit Report.

Use the Browse button to select the file to be uploaded, and click Upload File.

Note: While the file is uploading, do not use the back button or navigate away!

Once the file has been fully uploaded, you will see a File Upload screen similar to the one below.
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View Submission Status and Edit Report

Under the Reports drop down, select All Submission Status.

On the following screen, click Get Submission Status to view the status of the submission. Large reports may take a few minutes to appear in the Submission Status table.

When the edit check is complete, you will be able to view the edit check report by selecting the View hyperlink.