



# Fall PEIMS for Business - Quick Checklist



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# Fall PEIMS for Business - Quick Checklist

Updating TSDS - Quick Checklist			
✓ Step	Completion Date	Completed By	Notes
<a href="#">Security Administration &gt; Manage Users &amp; Roles</a>			
Ensure applicable employees have appropriate security permissions set up on their user profiles to access pages needed for TSDS reporting.			
<b>&lt;color #ed1c24&gt;Education Organization Domain&lt;/color&gt;</b>			
<a href="#">District Administration &gt; Tables &gt; District Information &gt; District Name/Address</a>			
Verify the <b>ESC Region Number</b> and <b>ESC County District Number</b> are accurate. The <b>ESC County District Number</b> is the six-digit ESC county district number assigned by Texas Education Agency (TEA).			
<a href="#">ESC County District Numbers</a>			
<a href="#">District Administration &gt; Tables &gt; District Information &gt; Campus Name/Address</a>			
Ensure the <b>Exclude from reporting to TEA</b> checkbox is selected for all non-instructional campuses/departments.			
<ul style="list-style-type: none"> <li>• Instructional campuses listed in ASKTed (001, 041, 101, etc.) should <b>not</b> have the <b>Exclude from reporting to TEA</b> checkbox selected.</li> <li>• Non-instructional campuses (701, 750, 999, and other campuses or departments needed for purchasing) should have <b>Exclude from reporting to TEA</b> selected.</li> <li>• <b>Education Service Centers (ESCs):</b> Exclude all campuses from TEA reporting.</li> <li>• <b>Business-only LEAs:</b> Exclude all campuses from TEA reporting.</li> </ul>			
<a href="#">District Administration &gt; Tables &gt; District Information &gt; Shared Services Arrangement</a>			
Verify Shared Services Arrangements, as needed.			
<b>&lt;color #ed1c24&gt;Staff Domain&lt;/color&gt;</b>			
<a href="#">Personnel &gt; Maintenance &gt; Demographic Information, Responsibility, and Employment Info</a>			
Add/update employee Personnel records.			
<b>Note:</b> Fiscal agents should use the <b>Co-op/SSA LEA</b> field on the Responsibility tab to report Co-op staff.			
<a href="#">Payroll &gt; Maintenance &gt; Staff Job/Pay Data &gt; Job Info</a>			
Ensure the <b>Exclude Days for TEA</b> checkbox is selected for all secondary jobs.			
<a href="#">Position Management &gt; Maintenance &gt; PMIS Position Admin &gt; Position Record</a>			









**Updating TSDS - Quick Checklist**

✓ Step	Completion Date	Completed By	Notes
<p>Ensure the <b>Exclude Days for TEA</b> checkbox is selected for all secondary jobs. The <b>Exclude Days for TEA</b> checkbox can be found on the following Position Management &gt; Maintenance pages:</p> <ul style="list-style-type: none"> <li>• PMIS Position Admin &gt; Position Record</li> <li>• PMIS Position Modify &gt; Position Record</li> <li>• PMIS Positions History &gt; History</li> <li>• PMIS Change in Position &gt; Change in Compensation</li> </ul>			
<p><a href="#">District Administration &gt; Maintenance &gt; Non-Employee</a></p>			
<p>For contracted instructional staff, complete all fields under Instructional Staff.</p> <p>Be sure to select a <b>TSDS Staff Type</b> code for all non-employee staff members with a 2023 start date or later.</p> <ul style="list-style-type: none"> <li>• Select 3 - <i>Contracted Professional Staff</i> if the staff member is a Contracted Professional (instructional and non-instructional).</li> <li>• Select 4 - <i>In-District Charter Prtnr Campus Teacher</i> if the staff member is a teacher employed at an In-district Charter Partner Campus.</li> </ul>			
<p><a href="#">District Administration &gt; Tables &gt; District Information &gt; District Name/Address</a></p>			
<p>Add data for contracted instructional staff as needed.</p>			
<p><b>&lt;color #ed1c24&gt;Finance Domain&lt;/color&gt;</b></p>			
<p><a href="#">Finance &gt; Tables &gt; TSDS Crosswalks</a></p>			
<p>Map financial data from the LEA's set of accounts to TEA's Chart of Accounts for both the current and previous file IDs.</p> <p>Verify the TSDS crosswalks copied from State Reporting are correct. Make corrections as needed.</p> <p>Verify that there is not a crosswalk for the automatic crosswalks processed by ASCENDER. Automatic crosswalks are applied after any applicable crosswalks entered on this page. Review the <b>Automatic Crosswalks</b> section on the <a href="#">Finance TSDS Crosswalk Tables</a> page.</p>			
<p><a href="#">Finance &gt; Inquiry &gt; General Ledger Inquiry &gt; General Ledger Account Summary</a></p>			
<p>Verify budget data.</p>			
<p>TSDS Level 1 Errors</p>			
<p><a href="#">District Administration &gt; Inquiry &gt; TSDS Level 1 Errors</a></p>			
<p>Review the <b>Extract Errors</b> reports and the <b>TSDS Level 1 Errors</b> report. <i>(This is an ongoing activity.)</i></p>			

# Data Quality Tips

## TSDS Data Quality Checklist

### Budget Data

ASCENDER Breadcrumb	Step
<a href="#">Finance &gt;</a> <a href="#">Inquiry &gt;</a> <a href="#">General Ledger Inquiry</a>	Click  to display all funds. Verify all funds are valid for the 2026 Budget. If not, create TSDS Crosswalks (Fund to Fund).  BudgetFund - Table ID C145B
	Click  to display all functions. Verify all functions are valid for the 2026 Budget. If not, create TSDS Crosswalks (Function to Function).  <b>TIP:</b> Expense function codes should not be 00.  BudgetFunction - Table ID C146B
	Click  to display all objects. Verify all objects are valid for the 2026 Budget. If not, create TSDS Crosswalks (Object to Object).  <b>TIP:</b> Expense object codes should not end with 0.  BudgetObject - Table ID C159B
	Click  to display all Program Intent Codes (PICs). Verify all PICs are valid for the 2026 Budget. If not, create TSDS Crosswalks (Program Intent to Program Intent).  <b>TIP:</b> Expense program intent code should not be 00.  BudgetProgramIntent - Table ID C147B
	Click  to display all organization codes. Verify all organization codes are valid for the 2026 Budget. If not, create TSDS Crosswalks (Org to Org).
	Verify organizations 001-698 are tied to a campus ID in AskTED. If not, create TSDS crosswalks as needed (Org to Org).
	Click  to verify accounts with PIC 91 are using function codes 36, 51 or 52.
	Click  to verify combinations: <ul style="list-style-type: none"> <li>• Org 701-750 should only be used in functions 41, 53, 99</li> <li>• Function 71 should be used with object 65XX</li> <li>• Funds 205, 255, 270, 429 should be used with PIC 24 rather than 30</li> <li>• Expense objects (6XXX) should not be used with Org 000, 709-719, 726-749 or 800-997</li> <li>• Expense Objects (6XXX) should not be used with PIC 00</li> <li>• Expense Objects (6XXX) should not use function 00</li> </ul> <a href="#">Account Code Matrices in FAR</a>
	Click  to verify the fiscal year for PEIMS Budget Funds. The fiscal year is 6 for the 2025-2026 fiscal year. (Only applies to funds reported for Fall PEIMS: 199, 240, 420, 599)

<b>ASCENDER Breadcrumb</b>	<b>Step</b>
	Verify expenditures exist for object code 6491 to record Statutorily Required Public Notices.
	Verify at least one account code exists for instructional staff development (function 13) with budget amounts.
	Verify at least one account code exists for general administration (function 41) with budget amounts greater than zero.
	Verify at least one account code exists for instructional resources and media services (function 12 and object 6100-6600) with a budget and actual expenditures greater than zero.
	Verify at least one account code exists for guidance, counseling, evaluation services or social work services or health services in function 31-33, object 6100-6600 with amounts greater than zero.
	Verify at least one account code exists with object code 6212 for audit services.
	Verify one account code exists for Matching State Funds (object 5829) in funds 240 and 410.
	Verify budgets in object 65XX are tied to function 71.

**Staff Data**

**Active Employees:**

<b>ASCENDER Breadcrumb</b>	<b>Step</b>
<a href="#">Personnel &gt; Maintenance &gt; Staff Demo &gt; Demographic Information</a>	<p>Verify the following fields are completed for all regular employees, contracted instructional staff, and long-term substitutes:</p> <ul style="list-style-type: none"> <li>• <b>Texas Unique Staff ID</b></li> <li>• <b>DOB</b></li> <li>• <b>Sex</b></li> <li>• <b>Race</b></li> <li>• <b>Ethnicity</b></li> </ul> <p>Generate a user-created report to verify accuracy.</p> <p>Staff Entity</p>
<a href="#">Personnel &gt; Maintenance &gt; Staff Demo &gt; Credentials</a>	<p>Ensure the PK Teacher Specialization is added to all PK Teachers of Record.</p> <p>PK Teacher Requirement - Table ID C207</p>
	<p>Ensure all TIA teachers have TIA data added. If TIA eligible, generate a user-created report to ensure they also have <b>Creditable Years of Service</b>. This is reported in Class Roster.</p> <p>TIA Designation - Table ID C322</p>
<a href="#">Personnel &gt; Maintenance &gt; Staff Demo &gt; Responsibility</a>	<p>Ensure Responsibility records are complete and accurate for applicable staff.</p> <p>StaffEducationOrganizationAssignmentAssociation Entity</p> <p><a href="#">Responsibilities - Quick Reference Chart</a></p>

ASCENDER Breadcrumb	Step
	Responsibility records with a <b>Staff Service</b> beginning with SE must have <b>Pop Served</b> set to 06.  Population Served - Table ID C030
	Responsibility records for aides must have <b>Number of Students</b> set to 0.
<a href="#">Personnel &gt;</a> <a href="#">Maintenance &gt;</a> <a href="#">Employment Info</a>	Verify that active employees only have one employment type selected, <b>Employment Type</b> or <b>Retiree Employment Type</b> .  Staff Type - Table ID C181
	Verify <b>Employee Status</b> is 1-5 or A when data is ready to be sent. ( <b>TIP:</b> It is recommended to set the Employee Status to 0 - Pending while gathering required data elements.  <a href="#">TSDS Best Practices for New Employee Records</a>
	Verify all employees with a <b>Latest Re-employment Date</b> do not have a <b>Termination Date</b> . For re-hires, delete the <b>Termination Date</b> and <b>Reason</b> .
	Verify all regular employees have a <b>Highest Degree</b> .
	Verify all employees have a <b>Percent of Day Employed</b> .
	Verify professional staff have <b>Total</b> and <b>In District</b> years of experience. (exclude current year in count)  Total Years Professional Experience
	Verify all auxiliary staff have an <b>Auxiliary Role ID</b> with a <b>Begin Date</b> . Staff who have an <b>Auxiliary Role ID</b> should have at least one payroll record coded to object code 612X. For TSDS reporting purposes, multiple auxiliary roles are allowed.  Auxiliary Role - Table ID C213
	Verify all paraprofessional staff with a Paraprofessional Certification have <b>Para Cert</b> selected with a <b>Begin Date</b> .  Paraprofessional Certification
	Verify <b>Employment Status</b> . Only staff with an <b>Employment Status</b> of 01-05 and A are reported to PEIMS. When all employee data is complete and accurate, change the <b>Employment Status</b> to include the record in the nightly send job.  <a href="#">TSDS Best Practices for New Employee Records</a>
<a href="#">Personnel &gt;</a> <a href="#">Maintenance &gt;</a> <a href="#">TSDS Days Employed Set</a>	Ensure all reported staff have <b>Number of Days Employed</b> .  StaffEducationOrganizationEmploymentAssociation Entity
	Ensure all reported staff have a <b>Percent of Days Employed</b> .  StaffEducationOrganizationEmploymentAssociation Entity

**Terminated Employees:**

ASCENDER Breadcrumb	Step
<a href="#">Personnel &gt; Maintenance &gt; Employment Info</a>	Verify the employee record has a <b>Termination Date</b> and <b>Termination Reason</b> .  <a href="#">TSDS Best Practices for Terminated Employee Records</a>
	Verify the employee record has an <b>End Date</b> for the <b>Auxiliary Role ID</b> and/or <b>Paraprofessional Certification</b> .
	Select <b>Extract for TSDS</b> to include the employee in TSDS Staff Domain extracts regardless of their employment status.
	Verify the employee record has an updated <b>Employment Status</b> , if not, select the appropriate code.
<a href="#">Personnel &gt; Maintenance &gt; Staff Demo &gt; Responsibility</a>	Verify the employee record has an <b>End Date</b> on the Responsibility record if one exists.  <a href="#">TSDS Best Practices for Terminated Employee Records</a>
<a href="#">Payroll &gt; Maintenance &gt; Staff Job/Pay Data &gt; Pay Info</a>	Verify the employee record has an <i>Inactive</i> <b>Pay Status</b> .
<a href="#">Personnel &gt; Maintenance &gt; TSDS Days Employed Set</a>	Verify the employee record has an <b>End Date</b> .

**Payroll Data**

ASCENDER Breadcrumb	Step
<a href="#">Payroll &gt; Reports &gt; User Created Report</a>	Review employee distributions. Verify organization codes on all payroll. No payroll expenditure codes should use org 000, 700, 709-719, 726-749, or 800-997.  <a href="#">Account Code Matrices in FAR</a>
	Verify admin staff coded to functions 41, 53, or 99 use valid org codes 701-750.  <a href="#">Account Code Matrices in FAR</a>
	Verify program intent codes on all payroll. No payroll program intent codes should use org 00.  <a href="#">Account Code Matrices in FAR</a>
	Verify all staff have at least one payroll code with a Payroll Activity code of 80.
	Staff paid with object 6129 must have an <b>Auxiliary Role ID</b> or responsibility with <b>Staff Classification</b> of 033 or 036 or Classroom Position record of 05 in the Schedule.
<a href="#">Personnel &gt; Tables &gt; Salaries &gt; Extra Duty</a>	Verify Business Allowances are set to Activity Code 79.  PayrollActivity - Table ID C018



The District PEIMS Coordinator is responsible for setting up the following, unless other arrangements have been established.

**Do not** make changes to this information unless authorized.

<b>ASCENDER Breadcrumb</b>	<b>Step</b>
<a href="#">District Administration &gt; Options &gt; TSDS &gt; Options</a>	Verify that the <b>As-of-Date</b> and <b>School Start Window (SSW) Date</b> fields have the correct dates.
	Ensure that email address(es) are entered under <b>Finance Extract Distribution List</b> and <b>Personnel/Payroll Extract Distribution List</b> . These designated email addresses allow a person or group of persons to receive extract emails.
<a href="#">District Administration &gt; Options &gt; TSDS &gt; Connection</a>	Verify the <b>API URL, Key,</b> and <b>Secret</b> are accurate.
<a href="#">District Administration &gt; Options &gt; TSDS &gt; Domains &amp; Entities</a>	Make selections on <b>Domains &amp; Entities</b> as described in the <a href="#">ASCENDER TSDS New School Year Best Practice Guide</a> .