


# Fall PEIMS for Business - Quick Checklist

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# Updating TSDS for ASCENDER Business - Quick Checklist

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| ✔ | **Step** | **Completion Date** | **Completed By** | **Notes** |
| | Security Administration > Manage Users & Roles | | | |
| | Ensure applicable employees have the appropriate security permissions to access pages with TSDS reporting fields. | | | |
| | District Administration > Tables > District Information > District Name/Address | | | |
| | Verify the **ESC Region Number** and **ESC County District Number** are accurate. The **ESC County District Number** is the six-digit ESC county district number assigned by Texas Education Agency (TEA).<br><br>ESC County District Numbers | | | |
| | District Administration > Tables > District Information > Campus Name/Address | | | |
| | Ensure the **Exclude from reporting to TEA** checkbox is selected for all non-instructional campuses/departments.<br><br>• Non-instructional campuses such as 701, 750, 999, and other campuses/departments needed for purchasing should have the **Exclude from reporting to TEA** checkbox selected.<br><br>• **ESCs**: Exclude all campuses from TEA reporting.<br><br>• **Business-only LEAs**: Exclude all campuses from TEA reporting. | | | |
| | District Administration > Options > TSDS > Options | | | |
| | Verify that the **As-of-Date** and **School Start Window (SSW) Date** fields have the correct dates. | | | |
| | Ensure that email address(es) are entered under **Finance Extract Distribution List** and **Personnel/Payroll Extract Distribution List**. These designated email addresses allow a person or group of persons to receive extract emails. | | | |
| | District Administration > Maintenance > Non-Employee | | | |
| | Select a **TSDS Staff Type** code for all non-employee staff members with a 2023 start date or later.<br><br>• Select *3 - Contracted Professional Staff* if the staff member is a Contracted Professional (instructional and non-instructional).<br><br>• Select 4 - *In-District Charter Prtnr Campus Teacher* if the staff member is a teacher employed at an In-district Charter Partner Campus. | | | |
| | Finance > Tables > TSDS Crosswalks | | | |

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| | Map financial data from the LEA's set of accounts to TEA's Chart of Accounts for both the current and previous file IDs.<br><br>Verify the TSDS crosswalks copied from State Reporting are correct. Make corrections as needed. | | | |
| | Verify that there is not a crosswalk for the automatic crosswalks processed by ASCENDER. Review the **Automatic Crosswalks** section on the Finance TSDS Crosswalk Tables page. | | | |
| | Finance > Maintenance > Create Chart of Accounts | | | |
| | Verify that you are not using a “parent” account in the account code structure to enter data. (Examples: Fund code 100, 200; Object code 1100, 5700, 6300) | | | |
| | Verify the correct organization codes are being used.<br><br>• Function 41 should not have a organization code of 999. The correct organization codes are 7XX. (Except for ESCs)<br><br>• Expenditure accounts (6XXX) should not have an organization code of 000. | | | |
| | Verify the correct Program Intent Codes (PIC) are being used.<br><br>• Funds 205, 255, 270, and 429 should not have PIC 30. These funds should have PIC 24.<br><br>• Verify you do not have PICs 31, 32, 34, or 35 in your chart of accounts. If you do, you will need to mass crosswalk the data to another account code. These codes have been retired and deleted. | | | |
| | Finance > Inquiry > General Ledger Inquiry | | | |
| | Verify that you have expenditures for object code 6491 to record Statutorily Required Public Notices. | | | |
| | Verify that you have expenditures for function 13. | | | |
| | Payroll > Maintenance > Staff Job/Pay Data > Job Info | | | |
| | Ensure the **Exclude Days for TEA** checkbox is selected for all secondary jobs. | | | |
| | Personnel > Maintenance > Employment Info | | | |
| | Verify that active employees only have one employment type selected, **Employment Type** or **Retiree Employment Type**. | | | |
| | Verify all employees with a **Latest Re-employment Date** do not have a **Termination Date**. | | | |
| | Verify all employees have a **Percent of Day Employed**. | | | |
| | Verify all auxiliary staff have an **Auxiliary Role ID** with a **Begin Date** . | | | |
| | Verify all paraprofessional staff with a Paraprofessional Certification have **Para Cert** selected with a **Begin Date**. | | | |

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| | Verify that employees with an **Employment Status** of *09 Other* are not reported to PEIMS. If the employee should be reported to PEIMS, it is recommended that you change the **Employment Status** to *02 Active auxiliary personnel*<br><br>• Be sure to add an **Auxiliary Role ID** to these employees. It is recommended that you use *222 Other Non-Exempt Auxiliary*. | | | |
| | **Terminated Employees** | | | |
| | • Verify the employee record has a **Termination Date** and **Termination Reason**.<br><br>• Verify the employee record has an **End Date** for the **Auxiliary Role ID** and/or **Paraprofessional Certification**.<br><br>• Verify the employee record has an **End Date** on the Responsibility record if one exists.<br><br>• Verify the employee record has a **Pay Status** of *Inactive*.<br><br>• Verify the employee record has an updated **Employment Status**, if not, select the appropriate code. | | | |
| | **Position Management (PMIS)** | | | |
| | Ensure the **Exclude Days for TEA** checkbox is selected for all secondary jobs. | | | |
| | **TSDS Settings in District Administration** | | | |
| | Enter TSDS Options. | | | |
| | Enter TSDS Connection Information. (Key and Secret) | | | |
| | Make selections on **Domains & Entities** as described in the ASCENDER TSDS New School Year Best Practice Guide. | | | |
| | Review the **Extract Errors** reports and the **TSDS Level 1 Errors** report *(this is an ongoing activity)*. | | | |