

Fall PEIMS for Business - Quick Checklist

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✔	**Step**	**Completion Date**	**Completed By**	**Notes**
	Security Administration > Manage Users & Roles			
	Ensure applicable employees have appropriate security permissions set up on their user profiles to access pages needed for TSDS reporting.			
	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). 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. • Instructional campuses listed in ASKTed (001, 041, 101, etc.) should **not** have the **Exclude from reporting to TEA** checkbox selected. • Non-instructional campuses (701, 750, 999, and other campuses or departments needed for purchasing) should have **Exclude from reporting to TEA** selected. • **Education Service Centers (ESCs)**: Exclude all campuses from TEA reporting. • **Business-only LEAs**: Exclude all campuses from TEA reporting.			
	District Administration > Tables > District Information > Shared Services Arrangement Verify Shared Services Arrangements, as needed.			
	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			

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	Select a **TSDS Staff Type** code for all non-employee staff members with a 2023 start date or later. • Select *3 - Contracted Professional Staff* if the staff member is a Contracted Professional (instructional and non-instructional). • 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			
	Map financial data from the LEA's set of accounts to TEA's Chart of Accounts for both the current and previous file IDs. 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. Automatic crosswalks are applied after any applicable crosswalks entered on this page. 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. • If the organization code is 701-750, then function code should be 41, 53 or 99. Function 41 should not have a organization code of 999. The organization codes are typically 701-703, 720, 750 or 751. (ESCs are the exception.) Reference the FAR Guide and make any changes for accounts that are not crosswalked. • Expenditure accounts (6XXX) should not have an organization code of 000 or PIC of 00.			
	Verify the correct Program Intent Codes (PIC) are being used. • Funds 205, 255, 270, and 429 should not have PIC 30. These funds are typically PIC 24. • 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 from the FAR Guide.			
	Finance > Inquiry > General Ledger Inquiry			
	Verify you have expenditures for object code 6491 to record Statutorily Required Public Notices.			

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	Verify you have at least one account code for instructional staff development (function 13) with budget amounts (for Fall PEIMS) and actual expenditures (for Mid-Year PEIMS) greater than zero.			
	Verify you have at least one account code for instructional resources and media services (function 12 and object 6100-6600) with a budget and actual expenditures greater than zero.			
	Verify you have at least one account code 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 you have at least one account code with object code 6212 for audit services.			
	Verify you have one account code for Matching State Funds (object 5829) in funds 240 and 410.			
	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**. For re-hires, delete the **Termination Date** and **Reason**.			
	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**.			
	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* Be sure to add an **Auxiliary Role ID** to these employees. It is recommended that you use *222 Other Non-Exempt Auxiliary*.			
	Terminated Employees			
	Personnel > Maintenance > Employment Info			
	Verify the employee record has a **Termination Date** and **Termination Reason**.			
	Verify the employee record has an **End Date** for the **Auxiliary Role ID** and/or **Paraprofessional Certification**.			
	Verify the employee record has an updated **Employment Status**, if not, select the appropriate code.			
	Personnel > Maintenance > Staff Demo > Responsibility			

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	Verify the employee record has an **End Date** on the Responsibility record if one exists.			
	Payroll > Maintenance > Staff Job/Pay Data > Pay Info			
	Verify the employee record has a **Pay Status** of *Inactive*.			
	Position Management (PMIS)			
	Ensure the **Exclude Days for TEA** checkbox is selected for all secondary jobs. The **Exclude Days for TEA** checkbox can be found on the following Position Management > Maintenance pages: • PMIS Position Admin > Position Record • PMIS Position Modify > Position Record • PMIS Positions History > History • PMIS Change in Position > Change in Compensation			
	District Administration > Options > TSDS > Domains & Entities			
	Make selections on **Domains & Entities** as described in the ASCENDER TSDS New School Year Best Practice Guide.			
	District Administration > Inquiry > TSDS Level 1 Errors			
	Review the **Extract Errors** reports and the **TSDS Level 1 Errors** report *(this is an ongoing activity)*.			