


# TSDS Upgrade Checklist for Business

# Table of Contents

**TSDS Upgrade Checklist for Business** ..... i
**TSDS Upgrade Checklist for Business** ..... 1

# TSDS Upgrade Checklist for Business

This checklist provides a quick checklist for verifying adding TSDS information for Business.

For additional information about setting up LEA data submissions for TSDS and The Exchange in the new year using ASCENDER DataConnect (ADC) steps, review the ASCENDER DataConnect (ADC): Rollover & ODS Instance Setup document.

Review the applicable submission guides for more information:

- TSDS PEIMS Fall Submission Data for Business
- TSDS PEIMS Mid-Year Submission Data for Business

| **Updating TSDS - Quick Checklist** | | | | |
|---|---|---|---|---|
| ✓ | **Step** | **Completion Date** | **Completed By** | **Notes** |
| | Ensure applicable users have been added to Security Audit with the appropriate permissions to access and perform maintenance in ASCENDER DataConnect (ADC). | | | |
| | Ensure applicable users have successfully set up their ASCENDER SecureAccess account and can access ASCENDER Enterprise and ASCENDER DataConnect (ADC). | | | |
| | Security Administration > Manage Users & Roles | | | |
| | Ensure applicable user profiles have the appropriate security permissions to access and maintain the pages needed for TSDS reporting. | | | |
| Review the ASCENDER DataConnect (ADC): Rollover & ODS Instance Setup document for specific guidance about setting up LEA data submissions for TSDS and The Exchange. | | | | |
| | 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 | | | |

| Updating TSDS - Quick Checklist | | | | |
|---|---|---|---|---|
| ✔ | **Step** | **Completion Date** | **Completed By** | **Notes** |
| | Ensure the **Exclude from reporting to TEA** checkbox is selected for all non-instructional campuses/departments.<br><br>• Instructional campuses listed in ASKTed (001, 041, 101, etc.) should **not** have the **Exclude from reporting to TEA** checkbox selected.<br><br>• Non-instructional campuses (701, 750, 999, and other campuses or departments needed for purchasing) should have **Exclude from reporting to TEA** selected.<br><br>• **Education Service Centers (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 the appropriate email address(es) are entered under **Finance Extract Distribution List**, **Personnel/Payroll Extract Distribution List**, and **TSDS Extract Errors Distribution List**. These are designated email addresses that allow a person or group of persons to receive extract emails. | | | |
| | District Administration > Maintenance > Non-Employee | | | |
| | For contracted instructional staff, complete all fields under Instructional Staff.<br><br>Be sure to 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 | | | |
| | 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.<br><br>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. | | | |

| Updating TSDS - Quick Checklist | | | | |
|---|---|---|---|---|
| ✔ | **Step** | **Completion Date** | **Completed By** | **Notes** |
| | Finance > Maintenance > Create Chart of Accounts | | | |
| | Verify that a “parent” account is not being used 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>• 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.<br><br>• 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.<br><br>• Program Intent Codes (PIC) 24, 26, 28, 29, and 30 will remain available for use in the Financial Accountability Resource Guide (FASRG) during fiscal years 2024-2025 and 2025-2026.<br><br>• Beginning fiscal year 2026-2027: PICs 26, 28, 29, and 30 will be removed from the FASRG.<br><br>• School systems are strongly encouraged to continue using PIC 24 internally for budgeting and tracking to maintain clarity and consistency in local documentation and reporting; however, the agency will consolidate the PIC 24 reported expenditures into PIC 11 for state reporting purposes and Public Education Information Management System (PEIMS) financial reports. | | | |
| | Finance > Inquiry > General Ledger Inquiry | | | |
| | 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 (for Fall PEIMS) and actual expenditures (for Mid-Year PEIMS) greater than zero. | | | |
| | Payroll > Maintenance > Staff Job/Pay Data > Job Info | | | |
| | Ensure the **Exclude Days for TEA** checkbox is selected for all secondary jobs. | | | |
| **Verify the following for Active Employees**: | | | | |
| | 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**. | | | |

| Updating TSDS - Quick Checklist | | | | |
|---|---|---|---|---|
| ✔ | **Step** | **Completion Date** | **Completed By** | **Notes** |
| | 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*<br><br>Be sure to add an **Auxiliary Role ID** to these employees. It is recommended that you use *222 Other Non-Exempt Auxiliary*. | | | |
| **Verify the following for 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. | | | |
| | Position Management > Maintenance > PMIS Position Admin | | | |
| | Ensure the **Exclude Days for TEA** checkbox is selected for all secondary jobs. | | | |