PEIMS MID-YEAR

Mary Morgan September 20, 2024

AGENDA – PEIMS MID-YEAR

- **PROGRAM AREA**
- **2024-2025 SCHOOL YEAR**
  - Data Governance Updates
  - Report Updates
  - Business Rule Updates
  - TSDS Upgrade Project Updates
- **CLOSEOUT**
  - Timeline
  - Frequently Asked Questions
  - Technical Resources
  - Questions

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PROGRAM AREA UPDATES & GUIDANCE

- State Funding program-related questions can be submitted to the State Funding Division:
  - Email: sfinance@tea.texas.gov
  - Phone: (512) 463-9238

- Financial Accountability program-related questions can be submitted to the Financial Accountability Division:
  - Email: financialaccountability@tea.texas.gov
  - Phone: (512) 463-9095

DATA GOVERNANCE UPDATES

- No updates to the following since TSDS Spring training:
  - Data Elements
  - Descriptor Tables

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BUSINESS RULE UPDATES

- Added Data Validation Rule 20032-0154:

Rule Level	Rule #	Rule Text / Business Meaning	Sev. /Level	Core	PEIMS	Applies To
2 and 3	20032-0154	There should be Actual Financial data where ActualFund is not "199", ActualProgramIntent is "11", and ActualObject is "61XX"-"64XX" and the sum of all ActualAmounts for this data must be greater than 0.	S		2	District Charter
		The actual financial data reported for a local education agency for all ActualFund codes EXCEPT the General Fund ("199") should include total amounts greater than zero ($0) for the Basic Educational Services ProgramIntent ("11") and at least one of the following expenditure Objects: Payroll Costs ("61XX"), Professional and Contracted Services ("62XX"), Supplies and Materials ("63XX"), and Other Operating Expenses ("64XX").				

- Added Data Validation Rule 20032-0155:

Rule Level	Rule #	Rule Text / Business Meaning	Sev. /Level	Core	PEIMS	Applies To
2 and 3	20032-0155	For each reported ActualProgramIntent, the sum of all ActualAmounts where ActualFund is not "199" and ActualObject is "61XX"-"64XX" should be greater than 0.	S		2	District Charter
		The actual financial data reported for each ProgramIntent should include total expenditures greater than zero ($0) for all ActualFund codes EXCEPT the General Fund ("199") and the following Objects: Payroll Costs ("61XX"), Professional and Contracted Services ("62XX"), Supplies and Materials ("63XX"), and Other Operating Costs ("64XX").				

TSDS UPGRADE PROJECT UPDATES

- **Data Element Name Changes:**

Data Element ID	XML Data Element Name	Upgrade Data Element Name
E0316A (was E0316)	FUND-CODE	ActualFund
E0317A (was E0317)	FUNCTION-CODE	ActualFunction
E3018A (was E0318)	OBJECT-CODE	ActualObject
E0320A (was E0320)	PROGRAM-INTENT-CODE	ActualProgramIntent
E0316S (was E0316)	FUND-CODE	SSAFund
E3010	N/A	BeginDate
E3020	N/A	EndDate

TSDS UPGRADE PROJECT UPDATES

- **Descriptor Name Changes**

Descriptor ID	XML Code Table Name	Upgrade Descriptor Name
C145A (was C145)	FUND-CODE	ActualFund
C146A (was C146)	FUNCTION-CODE	ActualFunction
C159A (was C159)	OBJECT-CODE	ActualObject
C147A (was C147)	PROGRAM-INTENT-CODE	ActualProgramIntent
C145S (was C145)	FUND-CODE	SSAFund

TSDS UPGRADE PROJECT UPDATES

- **Business Rule Changes:**

  - 20032-0155 Rule text has been updated to reflect the change in the data element name.
  - 20033-0006 Rule text has been updated to reflect a change to show the new data element name and entity name.
  - 10011-0005 Rule text has been updated to reflect a change to show the new entity name.
  - 20032-0156 Added Data Validation Rule.

TSDS UPGRADE PROJECT UPDATES

- **NEW Business Rule Changes:**
  - Revision: All references to the Fund data element have been updated to one of the following data element names specific to the entity in which they are located:
    - ActualFund - PriorYearActualExt entity
    - SSAFund - SharedServiceArrangementExt entity

  - Revision: All references to the Function data element have been updated to the following data element name specific to the entity in which they are located:
    - ActualFunction - PriorYearActualExt entity

  - Revision: All references to the Object data element have been updated to the following data element name specific to the entity in which they are located:
    - ActualObject - PriorYearActualExt entity

TSDS UPGRADE PROJECT UPDATES

- **NEW Business Rule Changes:**
  - Revision: All references to the ProgramIntent data element have been updated to the following data element name specific to the entity in which they are located:
    - ActualProgramIntent - PriorYearActualExt entity

- **NEW Entity/Common Type Change:**
  - Revised name of entity from ActualExt to PriorYearActualExt

TSDS UPGRADE PROJECT UPDATES

▪ **NEW** Entity/Common Type Change:

PriorYearActualExt Entity

Data Element	NP*	Core	PEIMS	Length	Data Type	Descriptor Table	Element ID
LocalEducationAgency 🔗							
FiscalYear			PM	1	Number		E0974
ActualAmount			PM	11	Number		E0774
ActualFund			PM		Descriptor	C145A	E0316A
ActualFunction			PM		Descriptor	C146A	E0317A
ActualObject			PM		Descriptor	C159A	E0318A
Organization			PM	3	Number		E0319
ActualProgramIntent			PM		Descriptor	C147A	E0320A
~~BeginDate~~			~~PM~~	~~10~~ `	~~Date~~		~~E3010~~
~~EndDate~~			~~PM~~	~~10~~	~~Date~~		~~E3020~~

TSDS UPGRADE PROJECT UPDATES

- **Promotion Logic:**
  - PEIMS Mid-year Promotion Logic

- **Test Cases:**
  - PEIMS Mid-year Test Cases

CLOSEOUT

TIMELINE

PEIMS Mid-Year Submission (Submission 2)	Date
TSDS PEIMS ready to load data to IODS	August 5, 2024
TSDS PEIMS ready for users to complete, approve, and accept submissions	December 16, 2024
PEIMS Mid-Year First Submission due date for LEAs and ESCs	January 23, 2025
PEIMS Mid-Year Resubmission due date for LEAs and ESCs	February 13, 2025
PEIMS Mid-Year data available to customers	March 6, 2025

FREQUENTLY ASKED QUESTIONS

In which IODS year is the Prior Year Actual data stored?

The PriorYearActualExt entity will be promoted from the current year IODS.

TECHNICAL RESOURCES

tsds

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TECHNICAL RESOURCES

- Technical Support
  - TSDSCustomerSupport@tea.texas.gov
- Technical Specification
  - 2024-2025 TSDS Web-Enabled Data Standards (TWEDS)
  - Known Issues
- TSDS Incident Management System (TIMS)
  - TSDS Incident Management System (TIMS) Support Application
  - TIMS Knowledge Base Article Repository
- Additional Resources
  - Financial Accountability System Resource Guide