



## PEIMS MID-YEAR

July 30-31, 2024 and August 1, 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



# PROGRAM AREA UPDATES & GUIDANCE



- State Funding program-related questions can be submitted to the State Funding Division:
  - Email: [sfinance@tea.texas.gov](mailto: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](mailto:financialaccountability@tea.texas.gov)
  - Phone: (512) 463-9095

A photograph of a classroom. In the center, a black chalkboard is mounted on a light blue wall. The chalkboard has the text '2024-2025 SCHOOL YEAR' written on it in white, bold, sans-serif capital letters. In the foreground, there are several wooden desks with bright orange plastic chairs. The room is brightly lit, and the walls are a light teal color.

2024-2025  
SCHOOL YEAR

# DATA GOVERNANCE UPDATES



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



# REPORT UPDATES



- Financial Organization Units on Financial Reports
  - There have been multiple TIMS tickets regarding Organization Units 699 not showing in the aggregated data on LEA's financial reports.
  - An issue has been identified where the reports are not displaying all administration organization units in the Campus ID selection parameter for these reports.
  - TEA is actively working to determine a corrective action to resolve this issue by the start of the 2024-2025 school year.
- **NEW** This issue was resolved on Friday, May 31, 2024.



# 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	<p>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.</p> <p>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").</p>	S		2	District Charter



# BUSINESS RULE UPDATES



## ■ Added Data Validation Rule 20032-0155:

Rule Level	Rule #	Rule Text / Business Meaning	Sev. /Level	Core	PEIMS	Applies To
2 and 3	20032-0155	<p>For each reported ActualProgramIntent, the sum of all ActualAmounts where ActualFund is not "199" and ActualObject is "61XX"- "64XX" should be greater than 0.</p> <p>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").</p>	S		2	District Charter



# 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:

- Rule text has been updated to reflect the change in the data element name.

Rule Level	Rule #	Rule Text / Business Meaning	Sev. /Level	Core	PEIMS	Applies To
2 and 3	20032-0155	<p>For each reported <b>ActualProgramIntent</b>, the sum of all <b>ActualAmounts</b> where <b>ActualFund</b> is not "199" and <b>ActualObject</b> is "61XX"- "64XX" should be greater than 0.</p> <p>The actual financial data reported for each <b>ProgramIntent</b> should include total expenditures greater than zero (\$0) for all <b>ActualFund</b> 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").</p>	S		2	District Charter



# TSDS UPGRADE PROJECT UPDATES



## Business Rule Changes:

- Rule text has been updated to reflect a change to show the new data element name and entity name.

Rule Level	Rule #	Rule Text / Business Meaning	Sev. /Level	Core	PEIMS	Applies To
2 and 3	20033-0006	<p><b>LocalEducationAgencyId</b> on the <b>SharedServicesArrangementExt</b> (SSA Actual Financial) data must match <b>FiscalAgentDistrictId</b> on a <b>SSAOrgAssociationExt</b> (Shared Services Arrangement).</p> <p>The fiscal agent district reporting SSA actual financial data must report SSA organization data.</p>	F		2	ESC District



# TSDS UPGRADE PROJECT UPDATES



## NEW Business Rule:

- Rule text has been updated to reflect a change to show the new entity name.

Rule Level	Rule #	Rule Text / Business Meaning	Sev. /Level	Core	PEIMS	Applies To
L2, L3	10011-0005	<p>If LocalEducationAgencyId and FiscalAgentDistrictId are the same value, then at least one ActualExt PriorYearActualExt data item must show a Fund that is be reported with an ActualFund that is a Shared Services Arrangement fund.</p> <p>For a shared services arrangement, if the reporting LEA is also the fiscal agent for an SSA type, then that LEA must also report actual financial data to include a shared services arrangement fund that matches the SSA type.</p>	F		PM	Charter, LEA, ESC



# TSDS UPGRADE PROJECT UPDATES



## NEW Business Rule:

- Added Data Validation Rule 20032-0156:

Rule Level	Rule #	Rule Text / Business Meaning	Sev. /Level	Core	PEIMS	Applies To
L2, L3	20032-0156	<p>If ActualFund is "599", then ActualObject must not be "6512", "6514", "6522", or "6526".</p> <p>For actual financial data, if the fund is Debt Service Funds ("599"), then the object must not be Right To Use Lease Liability - Principal ("6512"), SBITA - Principal ("6514"), Interest On Right To Use Leases ("6522"), or Interest on SBITA ("6526").</p>	F		PM	Charter, LEA



# TSDS UPGRADE PROJECT UPDATES



## ■ 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



# TSDS UPGRADE PROJECT UPDATES



## ■ Business Rule Changes:

- 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



# TSDS UPGRADE PROJECT UPDATES



## ■ Business Rule Changes:

- 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



## ■ 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



# TSDS UPGRADE PROJECT UPDATES



- Entity/Common Type Change:

- Revised name of entity from ActualExt to PriorYearActualExt




# TSDS UPGRADE PROJECT UPDATES



- NEW** Entity/Common Type Change:

**PriorYearActualExt Entity**

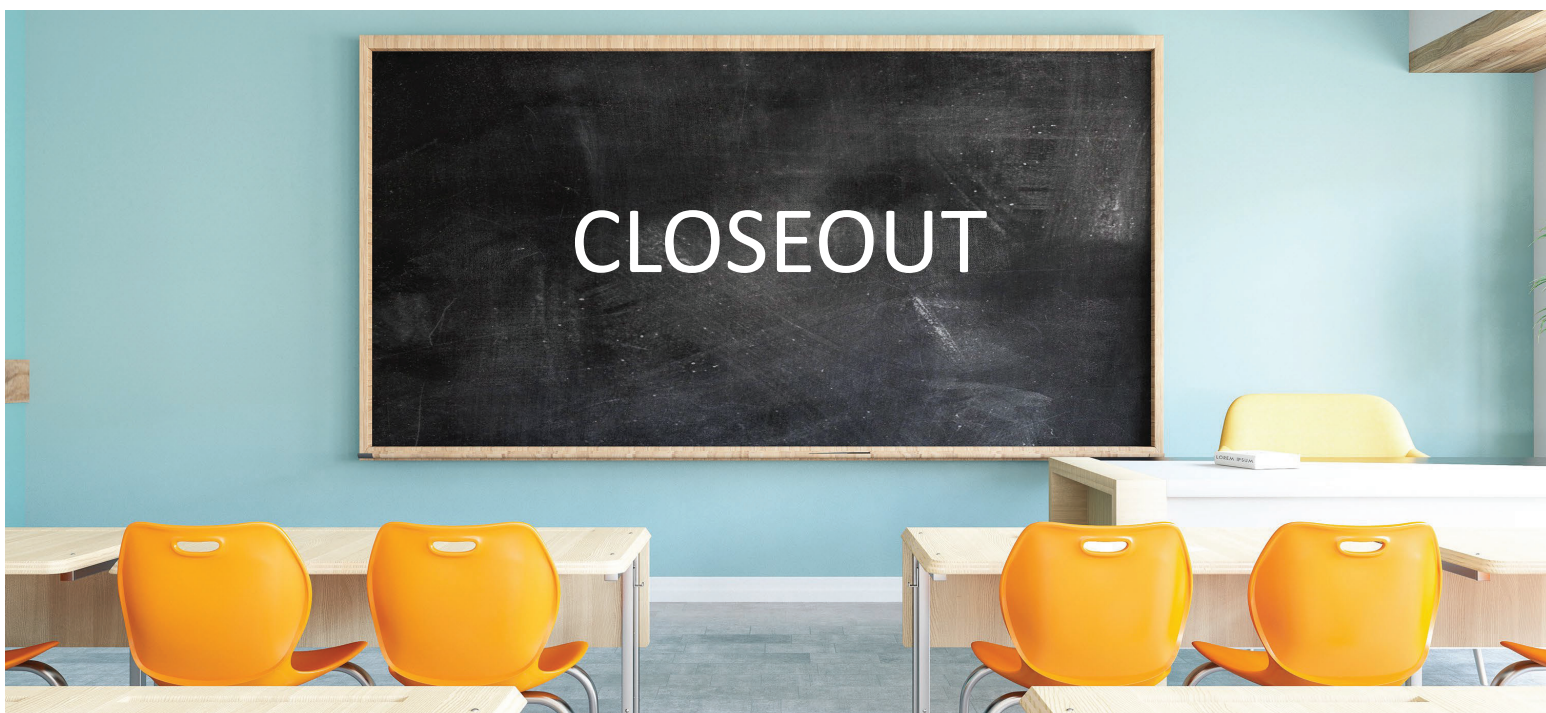
Data Element	NP*	Core	PEIMS	Length	Data Type	Descriptor Table	Element ID
LocalEducationAgency 							
FiscalYear			PM	1	Number		E0974
ActualAmount			PM	11	Number		E0774
ActualFund			PM		Descriptor	C145A	E0316A
ActualFunction			PM		Descriptor	C146A	E0317A
ActualObject			PM		Descriptor	C159A	E0318A
Organization			PM	3	Number		E0319
ActualProgramIntent			PM		Descriptor	C147A	E0320A
<del>BeginDate</del>			<del>PM</del>	<del>40</del>	<del>Date</del>		<del>E3010</del>
<del>EndDate</del>			<del>PM</del>	<del>40</del>	<del>Date</del>		<del>E3020</del>



# TSDS UPGRADE PROJECT UPDATES



- Promotion Logic:
  - [PEIMS Mid-year Promotion Logic](#)
- Test Cases:
  - [PEIMS Mid-year Test Cases](#)



# 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

- Technical Support
  - [TSDSCustomerSupport@tea.texas.gov](mailto: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](#)

