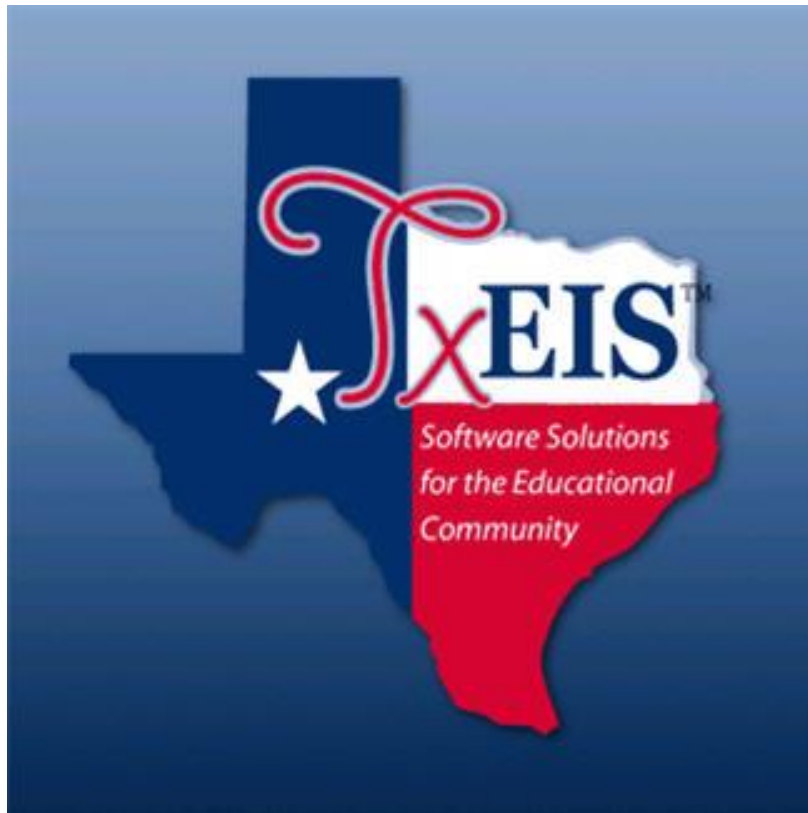# Preparing for PEIMS Business Submissions

Presented by ESC, Region 14
October, 2020

Organization
Shared Services Arrangement
Finance Budget
Staff

Complete the following steps in preparation for PEIMS submissions required during the school year.

_____1. Build a **Fall PEIMS 2020-2021 Folder** to save reports and backups in

⭐ **Finance – File ID C** ⭐

_____2. Enter all **Budget Amendments approved on or before the "As-Of" Date.**

_____3. Object Code 6491 – All Statutory Public Notices was added beginning with the 2019-2020 school year. Verify account code 199-41-6491 was **added to your chart of accounts.**

_____4. Add **new Funds and account codes** as appropriate.
- **266 – Elementary and Secondary School Emergency Relief (ESSER) –** used to account for federal stimulus funds granted through the CARES Act to support LEA's ability to operate and instruct students during the COVID-19 pandemic. (CFDA 84.425D)
- **277 – Coronavirus Relief Fund (CRF) -** used to account for federal CRF funds granted through the CARES Act for necessary expenditures incurred due to the public health emergency with respect to COVID-19 and to reimburse LEAs for expenses related to COVID-19 that were incurred dating back to March 1, 2020. (CFDA 21.019)

⭐ **Human Resources** ⭐

_____5. Ensure **All Employees & Long Term Substitutes, that are considered the Teacher of Record,** have **Unique IDs. See Unique ID Document.**

_____6. Verify that terminated employees, including Student Workers, have **Termination Dates and Reason** on the **Human Resources > Staff Job/Pay Data > Employment Info tab.**

_____**7.** Check the **School Year** for **PEIMS** in **Human Resources > Tables > District HR Options.**

★ State Reporting ★

_____8. Update TSDS Options. Complete the following from **State Reporting > Options**

- Submission Year: **2021**
- Fall snapshot date/As–of Date: **10-30-2020**
- **School Start Window: 10-30-2020**
- **Generic Program Codes** used to track participation in various programs will be completed by the Student PEIMS Coordinator.
- Save

_____**9. Delete/Clear Tables.** From **Utilities > Delete/Clear Tables.**
This utility, which is typically only run at the beginning of a new submission, allows you to delete existing data from the State Reporting tables. Do not make selections for any student related records. Student representatives will complete the deletions they need.

- **Options** and **Organization Data** areas, __no boxes__ should be selected.
- **Fall Collection:** select only the following:
  - Under the **Finance Data** select **Budget.**
  - Under the **Staff Data** select the **Demo & Payroll** and **Responsibilities.**
- **Mid Year Collection:**
  - Under the **Finance Data** select **Actual and SSA Actual.**
- **Summer Collection:**
  - Under the **Staff Data** select **Demo.**
- **Extended Collection:** no boxes should be selected**.**

Click the **Delete button.** This will **Delete Finance and Staff records and any other Records you selected**.

_____10. Verify Organization data. From **Maintenance > Organization,** review each tab for accuracy.

- On the **County District tab**: Verify information is correct. Contact your Student PEIMS Coordinator to complete the District wide Gifted and Talented and the CTE Programs of Study.
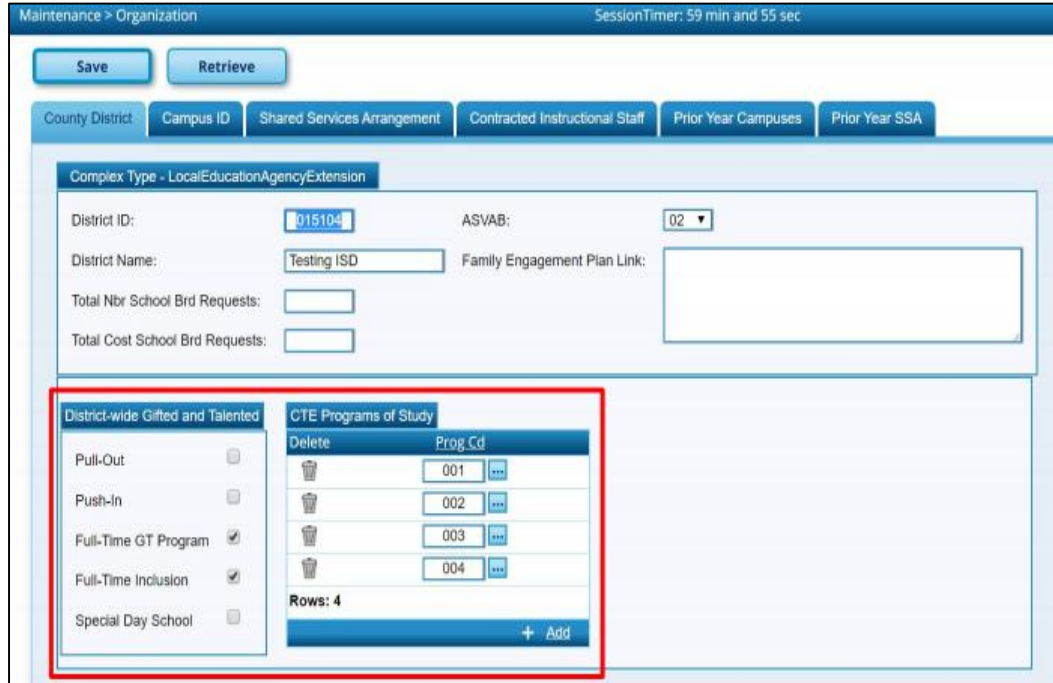
- On the **Campus ID tab:** Verify information and edit as needed.

- **Verify Campus Enrollment Types**

- NSLP This code indicates the National School Lunch Program (NSLP) participation status of the campus. (PEIMS code table: C212).
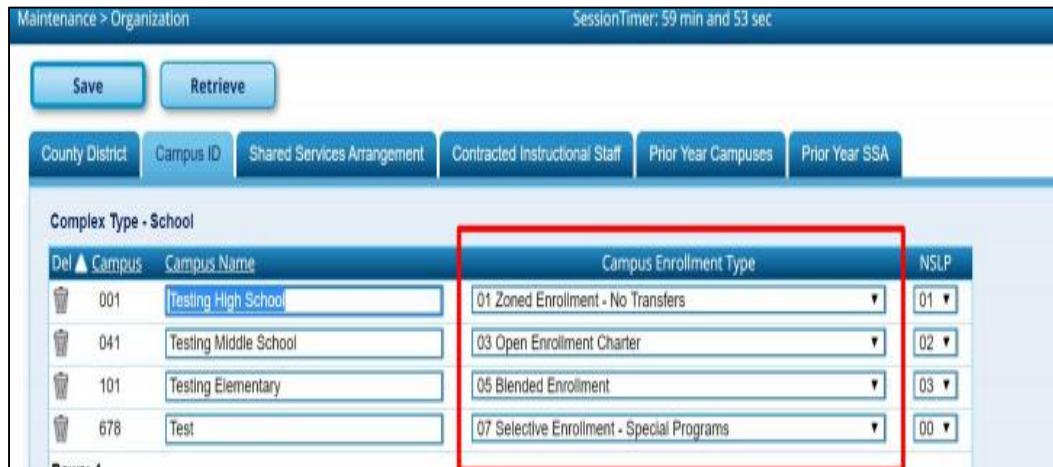
This information is not extracted and can only be entered on this tab.

- o 00 – No, not participating in NSLP
- o 01 – Yes, participating in NSLP without using any provision or the Community Eligibility Program
- o 02 – Yes, participating in NSLP under Provision 2
- o 03 – Yes, participating in NSLP under the community Eligibility Program
  - • **Note 1: Any new campuses must have been added to ASKTED to be accepted by PEIMS.**
  - • **Note 2: Complete Campus ID tab for Fall PEIMS Reporting. Complete Prior Year Campuses to report Mid-Year data.**

- • **Shared Service Arrangement tab:** Add, delete or modify as needed.
  - o Shared Services Type: Click on the ellipsis button [...] and select the program or service provided by the SSA. (PEIMS code table: C049)
  - o The Fiscal Agent District ID: Enter the Fiscal Agent of the SSA.
  - o Be careful to identify with your fiscal agent which services are rendered as part of a SSA and which are simply contracted services.

Note: Complete the Shared Service Arrangement tab for Fall PEIMS Reporting. Complete Prior Year SSA to report Mid-Year data.
Example only below. Your numbers for the Shared Serv Type may different.

Contracted Instructional Staff tab: Used for <u>Professional Volunteers</u> and <u>Contracted</u> <u>Instructional</u> Staff.

- o Add, delete or modify as needed.
- o Campus ID
- o Program Intent Code: Click on the ellipsis button [---] and select the code indicating the particular set of students for whom the cost of instruction and other services are directed.
- o Total-Contracted-Instr-Staff. Type the measurement of the portion of FTEs associated with the Campus and Program Intent Code designated.
- o When calculating contracted instructional staff FTEs, the following items must be considered:

    1. The percent of the day worked (number of hours worked divided by the number of work hours in the standard day),
    2. The percent of days per week worked (number of days worked divided by 5), and
    3. The percentage of weeks worked (the number of weeks worked divided by the number of weeks in the work year).

    For example, Mrs. Jones is hired on a contracted instructional staff basis to teach the tuba to three tuba players. Her contract specifies that she will work two hours each Monday and each Friday for the entire school year. Her FTE is 0.25 (two hours worked divided by the eight-hour work day in the district) multiplied by 0.40 (two days divided by five days) multiplied by 1.0 (36 weeks worked divided by the 36-week instructional year), for a reported FTE of 0.10.

- • All Contracted Staff must also be listed in **District Administration > Maintenance > Non-Employee.** Complete the following fields:

    - o **First, Middle and Last name**.
    - o **Job Code field:** select a job code from the list
    - o **SSN**
    - o **Unique Staff ID** (if available)
    - o **Sex**
    - o **Date of Birth**
    - o **Ethnicity**

- o **Race**
- o **Days Employed**
- o **Total Years**
- o **Percent of Day:** type the percentage of each standard work day for which the non-employee is hired to work. For example, if the non-employee works half-time, type .50. If he works full-time, type 100.
- o **Highest Degree**

Note: A non-employee cannot have the same social security number and Texas Unique Staff ID as an active employee in Human Resources.

DATA TYPES REQUIRED BY SUBMISSION PERIOD

DATA CATEGORY	EXTENSION DESCRIPTION	COMPLEX TYPE	TxEIS FIELDS
Organization TEDS: 2.1	District Shared Services Arrangement Campus	10010 10011 10020	State Reporting > Maint > Organization
Finance TEDS: 2.2	Budget	20030	Finance > General Ledger
Staff TEDS: 2.3			
Identification Demographic	SSN, Name, Gen, Sex, Ethnicity, Staff-Type-Code, Highest Degree Level Code *Total Yrs Prof Exp/Highest Degree	30040	HR > Maint > Staff Demo > Demo Info HR > Maint > Staff Job/Pay > Employment Info
Demographic	DOB, Ethnicity & Race Indicators, TX Unique Staff ID	30040	HR > Maint > Staff Demo > Demo Info
Employment-Payroll Summary	Percent of Day Employed *Years Experience in District Number of Days Employed	30050	HR > Maint > Staff Job/Pay > Employment Info HR > Maint > Staff Job/Pay > Job Info
District Finance Data	Contracted Instructional Staff	30055	Stored in State Reporting
Employment Payroll Accounting	Payroll Activity Code, Account Code Payroll Amount	30060	HR > Maint > Staff Job/Pay > Distribution HR > Maint > Staff Job/Pay > Job Info
Staff Data - Responsibility	Responsibility	30090	HR > Maint > Staff Demo > Responsibility

* These TSDS fields are required only for professional employees

★ Human Resources ★

VERIFY STAFF INFORMATION

Human Resources > Maintenance > Staff Job/Pay Data > Employment Info

Note: Consider using a User Created Report to review.

_____**11. Percent-Day-Employed:** Percent Day Employed is the percentage of a standard district work day for which the employee is hired to work.

Example: The standard work day for the district is 7 hours. An employee is hired to work for 4 hours per day. 4/7 = .571, which is rounded down. So the Percent Day Employed would be 57%.

Employees such as cafeteria workers and bus drivers who work only a few hours each day should **not** be reported as 100 in this field. Consider the number of hours worked in relation to the standard district work day, not the job.

_____**12. Auxiliary Role ID** This must be reported for all employees who serve in a **Non-Professional** or **Non-Paraprofessional role.**

- o Assign **Auxiliary Role ID** in the **HR > Maintenance > Staff Job/Pay Data> Employment Info Tab**
- o You will **NOT** need to report a Responsibility Record.
- o You can find the codes TEDS Code Table **C213** which lists all Auxiliary Role IDs.

- These employees should be paid with Object Code 6129
- Auxiliary Role ID's should begin with 2.

_____**13. Role ID – Responsibility Records.** This must be reported for all employees who serve in a **Professional** or **Paraprofessional (Classroom Aide) role** and will require additional information. Most Role IDs and Service IDs will come from the Master Schedule but for those that do not, Role IDs and Service IDs should be **built in Human Resources** so they remain year after year. Communicate with your PEIMS Coordinator to obtain unknown data such as pop(ulation) served or number of students or to let them know what records you created.

HR > Maint > Staff Demo > Responsibility tab

- **Professional or Paraprofessional role (Classroom Aide).**
  - Campus
  - Role ID - Role ID's should begin with 0 or 1.
  - Service ID
  - Pop Served
  - # of Students if applicable. Classroom Aides will show 000 students.
  - These Employees are paid with Object Code 6129

- **Multiple records** are required for persons who perform duties on more than one campus, assume more than one role, and/or perform more than one type of service.
- If **no staff responsibility record is reported**, the assumption is made that the person is an auxiliary staff member

Examples of some staff requiring a Responsibility Record in Human Resources includes, but is not limited to:

*Superintendent	**Directors in the Areas of:**
*Principals	*Bus Driver
*Assistant Principals	*Maintenance
*Counselors	*Custodian
*Business Manager	*Technology
*Vocational Ag (if not Teacher of Record)	*Cafeteria
*Teacher Aides	
*Librarians (certified or aides)	
*Diagnosticians	
*Nurses (LVN and RN)	

Counselors

- Texas Senate Bill (SB) 490 requires that monthly minutes must be reported for all counselors. You will report the monthly minutes that the employee is serving as a counselor in any capacity.

  - Example 1: The counselor is a full time employee serving as a counselor for 100% of the day and works 8 hours a day. This counselor would be reported with 9600 minutes.
  - Example 2: The counselor is a part-time employee and works 4 hours per day. This counselor would be reported with 4800 minutes based on an 8-hour work day.
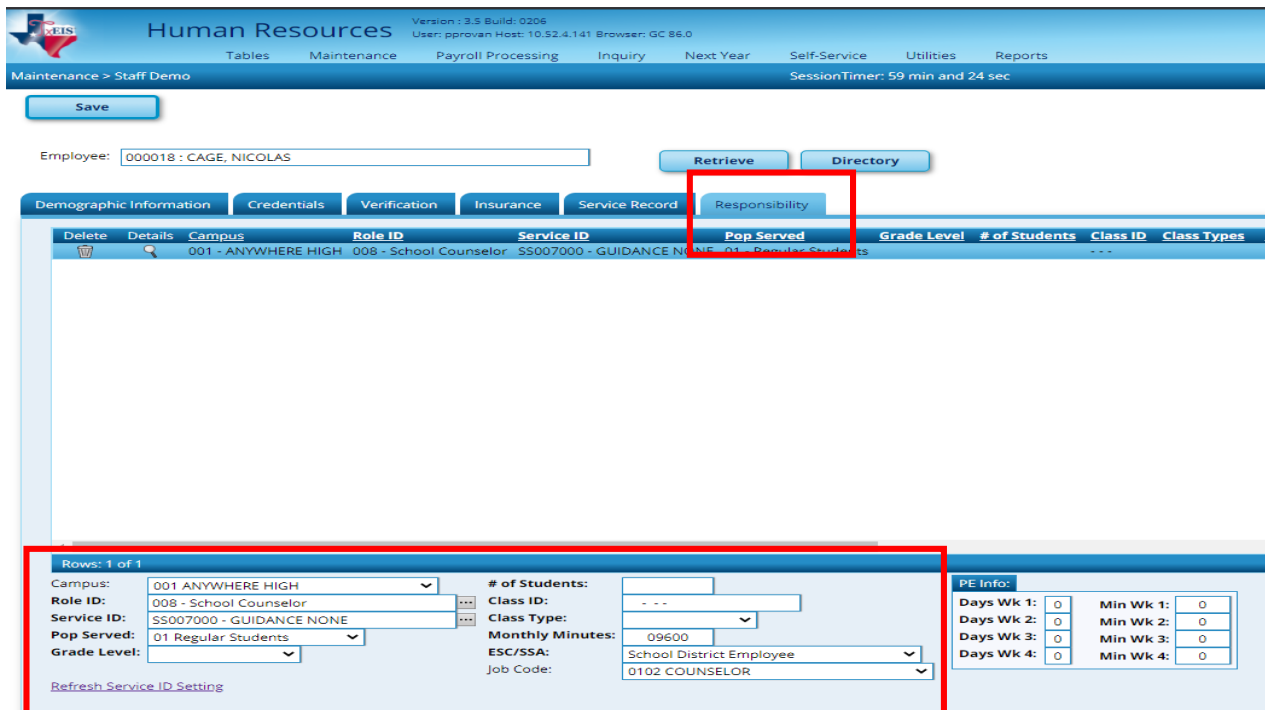
Note 1: Samples of common Non-classroom responsibilities are shown at the end of this document.

Note 2: For other resources see page 21-23 of this document for the TEDS Role ID vs Auxiliary Role ID and coding for substitutes.

Hourly Employees (Pay Type 3)

Annual salary and account code information for hourly employees should be set up in

Maint > Staff job / Pay Data > Employment Info

Enter the Activity Code, Fund, Function, Obj, Org and Program Intent used to pay the employee and an estimated salary under **Estimated Annual Salary (Hourly Employees Only)** (Pay Type 3)

_____**14. Number of Days Employed.** This is the actual number of at-work days within the school year the person is scheduled to work in the district.

Human Resources > Maintenance > Staff Job/Pay Data > Job Info

_____**15. Employee Highest Degree, Years of Service**

Human Resources > Maintenance > Staff Job/Pay Data > Employment Info

Required on all employees. Years of service are reported on professional staff only. All paraprofessional and auxiliary staff should show 0 years professional experience. Years should reflect the number of years completed as of September 1 of the school year and would, therefore, **not** include the current school year.

_____**16. Verify Prekindergarten teachers have correct credentials in Human Resources application.** House Bill 3 (HB3) made a variety of adjustments to eligibility for funding for prekindergarten programs.   HB3 Section 2.019 **requires Local Education Agencies (LEAs) to operate a full-day prekindergarten program** for children who are at least four years of age.
Along with these adjustments, additional data reporting to TEA is required.

- Additionally, Senate Bill 1679 allows a student who is eligible for prekindergarten at the age of three to automatically be eligible for enrollment in a prekindergarten class in the following school year.
- PK teachers must be a Certified Teacher and also have one teaching specialization code that is associated with required additional qualifications. Per TEA, if an LEA offers a Three-year-old and Four-year-old prekindergarten program, the program is considered a high-quality prekindergarten program. For additional information about the High Quality Prekindergarten Program, review TEA website: https://tea.texas.gov/Academics/Early_Childhood_Education/High-Quality_Prekindergarten_Program/

A.   In TxEIS, begin by verifying the Credentials table includes the necessary info.

HR >Tables > Credentials > Teaching Specialization tab,

- For each credential associated with Prekindergarten/early childhood education, select one of the additional qualifications in which a prekindergarten teacher must be certified per the Texas Education Data Standards (TEDS).
  The following codes are found in the **PEIMS TEDS C207** code table:
    - o   01 Certification offered accredited by Montesorri
    - o   02 At least 8 yr experience teaching in natl accredited child care pgm
    - o   03 Employed as a pre-k tchr in sch dist where pre-k pro devt met
    - o   04 A grad or undergraduate degree in early childhood ed or early childhood spec ed
    - o   05 A Child Development Associate (CDA) credential
    - o   06 Documented completion of the TSR Comprehensive

- It may be necessary to build additional Teaching Specialization codes if district has multiple PK teachers with different Specializations.
- Review existing Specialization for accuracy.
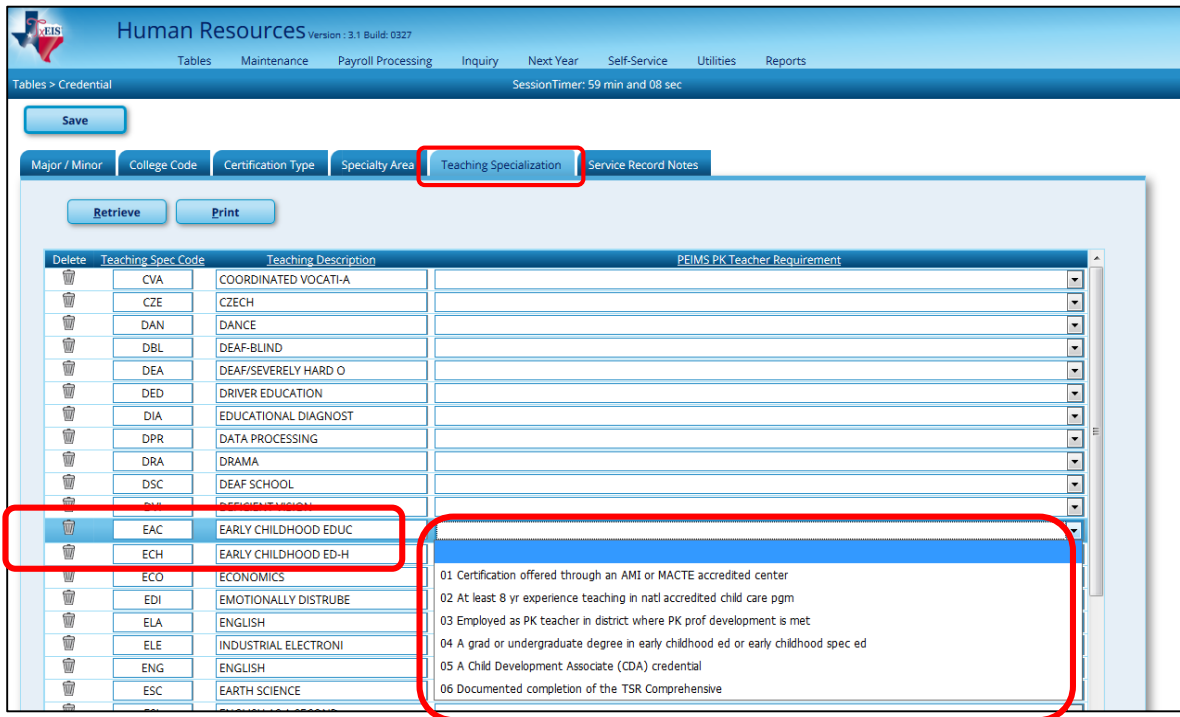
B. The next step is to assign those specializations to all PK teachers.

Maintenance > Staff Demo > Credentials tab

- **Under Certification:**
  - Specialty Area - select the general area or level covered by the certificate
  - Teaching Specialization - select the teaching specialty covered by the certificate.
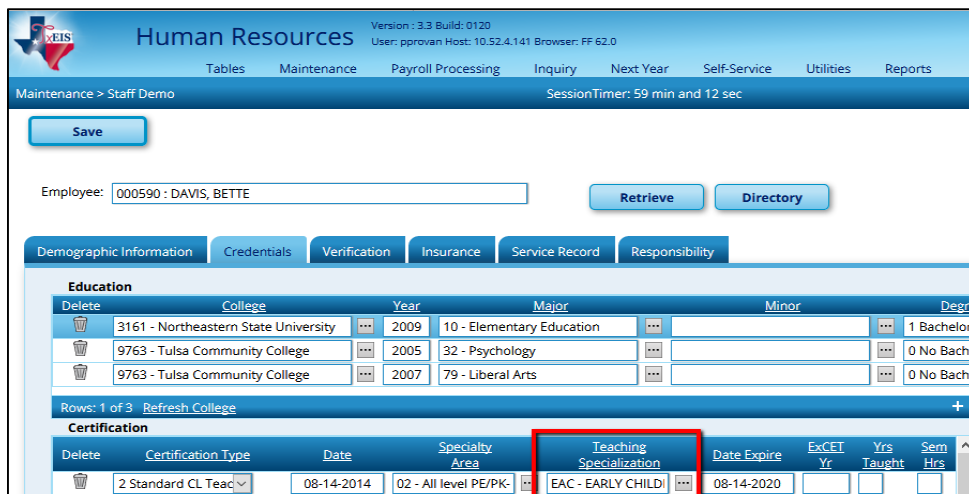
_____17. **Run Report for Verifying Data:**

A. **Responsibilities**:

Human Resources > Reports > HR Reports > Payroll Information Reports > HRS6350 - Employee Responsibility Data

B. **Use the User Created Rpt to Verify:**

- **First Name**
- **Last Name**
- **% Assigned**
- **Acct Codes**

- **Contract total**
- **Activity Code**
- **# Days Emp**
- **Any other data elements desired.**

Reports > User Created Reports > HR Report

Save **Create Report** **Delete** **Reset**

Report Template
[_____] ☐ Public **Retrieve** **Directory**

Report Title
[_____]

Employee Nbr: [____] ☐ Active Employees Only

Employee Demographic

☐ Employee Nbr	☐ Staff ID/SSN	☐ Maiden Name	☐ Phone Area Cd	☐ Last Change Date		
☐ Texas Unique Staff ID	☐ Address Number	☐ Former Prefix	☐ Phone Nbr	☐ Citizenship	☐ Emer Contact	☐ Hispanic/Latino
☐ Name Prefix	☐ Street/P.O. Box	☐ Former First Name	☐ Bus Phone Area	☐ Marital Stat	☐ Relationship	☐ American Indian
☑ First Name	☐ Apt	☐ Former Middle Name	☐ Bus Phone Nbr	☐ Other Language	☐ Emer Notes	☐ Asian
☐ Middle Name	☐ City	☐ Former Last Name	☐ Bus Ext	☐ Local Use 1	☐ Emer Area Cd	☐ African American
☑ Last Name	☐ State	☐ Former Generation	☐ Cell Area Cd	☐ Local Use 2	☐ Emer Phone Nbr	☐ Pacific Islander
☐ Generation	☐ Zip	☐ Driver's License	☐ Cell Phone Nbr	☐ Email	☐ Emer Ext	☐ White
☐ Sex	☐ Zip+4	☐ DL State	☐ Local Restriction	☐ Home Email		
☐ DOB	☐ Addr Country	☐ DL Expir Date	☐ Public Restriction	☐ Employee Notes		

Certification

☐ Cert Type	☐ Specialty Area
☐ Cert Date	☐ Teaching Spec
☐ Date Expire	

Responsibility

☐ Campus	☐ Pop Served	☐ Class ID	☐ Job Code	☐ Days Wk 3	☐ Min Wk 2
☐ Role ID	☐ Nbr Of Students	☐ Class Type	☐ Days Wk 1	☐ Days Wk 4	☐ Min Wk 3
☐ Service ID	☐ Monthly Minutes	☐ ESC/SSA	☐ Days Wk 2	☐ Min Wk 1	☐ Min Wk 4

Employment

☐ Employee Status Code	☐ Yrs Non-Professional Experience	☐ Original Emp Date	☐ Take Retiree Surcharge	☐ W-2 Elec Consent	☐ Termination Reason
☐ Highest Degree Achieved	☐ Yrs Non-Professional in District	☐ Latest Re-Employ Date	☐ NY Take Retiree Surcharge	☐ 1095 Elec Consent	☐ Termination Reason Descr
☐ Percent Day Employed	☐ Contract Class	☐ Retirement Date	☐ Extract ID	☐ ERS Retiree Health Elig	☐ Full Semester
☐ Est Annual Salary	☐ Contract Term	☐ Termination Date	☐ Fingerprint Status	☐ NY ERS Retiree Health Elig	☐ PEIMS Auxiliary Role ID
☐ Yrs Professional Experience	☐ Contract Year	☐ Extended Leave Begin	☐ Fingerprint Extract Date	☐ Employment Type	
☐ Yrs Professional in District	☐ Graders Taught	☐ Extended Leave End	☐ Fingerprint Date	☐ Retiree Employment Type	

Pay Information

☐ Pay Stat	☐ Pay Campus	☐ Tax Exempt	☐ W4 Marital Status	☐ Unemployment Flg	☐ TRS Status	☐ TRS Begin Date	☐ FSP Staff Data Cd
☐ Pay Dept	☐ Campus Name	☐ Nbr Exempt	☐ FICA Eligible	☐ EIC Code	☐ Health Ins Code	☐ End 90 Day Period
☐ Dock Rate						

Extra Duty Pay

☐ Extra Duty Code	☐ Extra Duty Amt
☐ Extra Duty Descr	☐ Remain Amt
☐ Extra Duty Type	☐ Remain Pymts

Bank

☐ Bank Code	☐ Bank Acct Type
☐ Bank Name	☐ Pre-Note
☐ Bank Acct Nbr	☐ Bank Acct Amt

Job Information

☐ Job Code	☑ Percent Assigned	☐ Payoff Date	☐ Pay Grade	☐ Daily Rate	☐ Overtime Eligible	☐ Workers' Comp Cd
☐ Job Descr	☐ Department	☑ Nbr Days Employed	☐ Pay Step	☐ Hrly Rate	☐ Overtime Rate	☐ Workers' Comp Annual
☐ Primary Job	☐ Pay Type	☐ Nbr Days in Contract	☐ Pay Schedule	☐ Pay Rate	☐ Hours/Day	☐ Workers' Comp Remain
☐ Prim Campus	☐ Calendar Code	☐ Local Contract Days	☐ Base Annual	☐ TRS Position Cd	☐ Exempt Status
☐ Campus Name	☐ Contract Begin Dt	☐ Nbr of Annual Pymts	☑ Contract Total	☐ Accrual Cd	☐ State Minimum Salary	☐ Incr Pay Step
☐ Nbr Mon Contr	☐ Contract End Dt	☐ Remaining Pymts	☐ Contact Balance	☐ Accrual Rate	☐ TRS Year	☐ Vacant Position
☐ Yrs of Job Exper	☐ Yrs in Career Ladder	☐ Wkly Hrs Sched	☐ Wholly Sep Amt	☐ Reg Hrs Worked	

Distribution

				☑		
☐ Job Cd	☐ Acct Type					
☑ Fund	☑ Function	☑ Object	☑ Sub Object	☑ Organization	☑ Fiscal Year	☑ Program Intent	☑ Ed Span	☑ Project Detail
☐ Contrib Acct Flg	☐ Perf Pay					

Deductions

☐ Deduction Cd	☐ Employer Amt	☐ Employer Amt	☐ Remain Pymts	☐ Refund	☐ Cafe 125	☐ Emplr Contrib Factor	☐ TEA Contrib Factor

Additional Resources and Reminders:

Object Code

- Role ID vs Auxiliary (TEDS Section 2.3)

When to Report ROLE-ID or/and AUXILIARY-ROLE-ID

Staff Type Code (C181)	Payroll Object Code (C159)	Role ID (C021) / Auxiliary Role ID (C213)	Role ID Reported?	Auxiliary Role ID Reported?
1 - Employee	6119 - Salaries or Wages-Teachers and Other Professional Personnel 6112 - Salaries or Wages for Substitute Teachers and Other Professionals	any from C021 (but generally not 033 or 036)	Yes	No
1 - Employee	6129 - Salaries or Wages for Support Personnel 6122 - Salaries or Wages for Substitute Support Personnel	paraprofessional 033 or 036	Yes	No
1 - Employee	6129 - Salaries or Wages for Support Personnel 6122 - Salaries or Wages for Substitute Support Personnel	any from C213	No	Yes

1 - Employee	Any combination of
	Professional Salaries/Wages:
	  6119 - Salaries or Wages-Teachers and Other Professional Personnel, or
	  6112 - Salaries or Wages for Substitute Teachers and Other Professionals
	AND
	Support Salaries/Wages:
	  6129 - Salaries or Wages for Support Personnel, or
	  6122 - Salaries or Wages for Substitute Support Personnel
		any from C021 AND paraprofessional 033 or 036	Yes	No

1 - Employee	Any combination of
	Professional Salaries/Wages:
	  6119 - Salaries or Wages-Teachers and Other Professional Personnel, or
	  6112 - Salaries or Wages for Substitute Teachers and Other Professionals
	AND
	Support Salaries/Wages:
	  6129 - Salaries or Wages for Support Personnel, or
	  6122 - Salaries or Wages for Substitute Support Personnel
		any from C021 AND any from C213	Yes	Yes

3 - Contracted Professional Staff	Payroll data is not reported for contracted professional staff	Any from C021	Yes	No

Determining OBJECT-CODE from ROLE-ID or/and AUXILIARY-ROLE-ID

Staff Type Code (C181)	Role ID (C021) or Auxiliary Role ID (C213)	Payroll Object Code (C159)
1 - Employee	Any Role ID from C021 (but generally not 033 or 036)	6119 - Salaries or Wages-Teachers and Other Professional Personnel 6112 - Salaries or Wages for Substitute Teachers and Other Professionals
1 - Employee	Paraprofessional Role IDs: 033 – Educational Aide 036 – Certified Interpreter	6129 - Salaries or Wages for Support Personnel 6122 - Salaries or Wages for Substitute Support Personnel Or, for some exempt professionals: 6119 - Salaries or Wages-Teachers and Other Professional Personnel
1 - Employee	Any Auxiliary Role ID from C213	6129 - Salaries or Wages for Support Personnel 6122 - Salaries or Wages for Substitute Support Personnel

1 - Employee	Combination of:
	Any Role ID from C021
	AND
	a Paraprofessional Role ID:
	033 – Educational Aide
	036 – Certified Interpreter
		Report both
		Professional Salaries/Wages:
		  6119 - Salaries or Wages-Teachers and Other Professional Personnel, or
		  6112 - Salaries or Wages for Substitute Teachers and Other Professionals
		AND
		Support Salaries/Wages:
		  6129 - Salaries or Wages for Support Personnel, or
		  6122 - Salaries or Wages for Substitute Support Personnel, or
		  6119 - Salaries or Wages-Teachers and Other Professional Personnel

1 - Employee	Combination of:
	Any Role ID from C021
	AND
	Any Auxiliary Role ID from C213
		Report both
		Professional Salaries/Wages:
		  6119 - Salaries or Wages-Teachers and Other Professional Personnel, or
		  6112 - Salaries or Wages for Substitute Teachers and Other Professionals
		AND
		Support Salaries/Wages:
		  6129 - Salaries or Wages for Support Personnel, or
		  6122 - Salaries or Wages for Substitute Support Personnel

3 - Contracted Professional Staff	Any Role ID from C021	Payroll data is not reported for contracted professional staff

- **Coding Chart for Substitute and Absent Regular Staff (TEDS Section 2.3)**

Example(s)

Chart A: Coding for Substitute and Absent Regular Staff

Type of Staff	See Example	Example	Report on the StaffResponsibilitiesExtension Complex Type		
			Role	Service	Students
Substitute	5a	Typical type of substitute: hired on a daily basis to substitute teach but is not on the regular district payroll.	Is not reported through PEIMS.	Is not reported through PEIMS.	
	5b	"Floating Substitute" Professional district employee who is hired on a **long-term basis** to substitute as needed in whatever classroom falls vacant on a given day due to a teacher calling in sick or taking a personal leave day.	047	SR000007	0
	5c	Substitute for classroom staff **not returning** to classroom. Teaching position has become vacant through death, resignation or termination.	047	Appropriate service id for the class	Number of students
Classroom staff out on the "as-of-date"	5d	Classroom staff **still** on the district payroll who are out on a sabbatical, a suspension, or for an extended illness and whose classroom duties **have been permanently reassigned.**	Appropriate role	SR000007	0
Classroom staff that will be returning to the classroom	5e	Classroom staff on sick leave, pregnancy or family medical emergency leave whose duties are **temporarily assigned** to a substitute. The substitute is not reported.	Appropriate role	Appropriate service for class	Number of students

The typical type of substitute teacher where a person is hired on a daily basis to substitute teach but is not on the regular district payroll is not reported through PEIMS.

- **For the FALL submission, the name will be as it is on the PEIMS Fall snapshot date (for 20-21 October 30, 2020).**
  Example: If you have a teacher whose last name was Smith, that got married on November 1, after the Fall Snapshot date and she changed her last name to Jones, you will report her last name as Smith, as it was on the Fall Snapshot date.

- Effective in the 2019-2020 school year, for an LEA to be eligible to receive Carl D. Perkins funding, they must offer at least one program of study.

- LEAs should report all programs of study that are offered to their students.

Paraprofessional staff includes educational aides and certified interpreters.
NEW for 2020-2021:
- **New rule: For a particular TX-UNIQUE-STAFF-ID, if at least one responsibility is for ROLE-ID "033" and POPULATION-SERVED-CODE "06", then PARAPROFESSIONAL-CERTIFICATION-INDICATOR-CODE must not be blank.**
- **"033"- Educational Aide: Performs routine classroom tasks under the general supervision of a certified teacher or teaching team**
- **Pop Served "06": Special Education Students: Those students served in special education programs as determined by the admission, review, and dismissal committee**
- **PARAPROFESSIONAL-CERTIFICATION-INDICATOR-CODE indicates whether a paraprofessional staff person is certified**
- **https://tealprod.tea.state.tx.us/TWEDS/86/387/654/0/DataComponents/DataElements/List/14089**

- **Reference: Additional General Consideration from the TASBO.**

10/1/19

Preparing for Fall PEIMS Budget Submission

By Amanda Brownson, Ph.D.

Fall PEIMS budget data reminders:

Districts are currently preparing any last budget amendments needed prior to submission of fall PEIMS budget data. It is always a good idea to amend the budget as new information becomes available that will enable the board to better fulfill its obligation to provide proper district oversight. But an amendment now will also allow you to provide PEIMS data that is as accurate as possible.

Revenue

The first thing you might want to consider is the importance of any amendments needed to ensure your revenue projection has turned out to be as close as possible to where you think you will actually land. For FIRST purposes, the important measure here will be looking at PEIMS budget to PEIMS actual revenues (object codes 57XX and 58XX) in the general fund (199). If you have gained a better understanding of House Bill 3, or if you notice that a significantly larger or smaller number of students has shown up in the district than you anticipated, then this might be a good time to amend the budget to reflect this new understanding. Remember that to receive full points, you only need to be within 10% of actuals over a three-year period.

Expenditures

If you have not already done so, now might be a good time to set up the new PIC codes that will be used for House Bill 3. You will likely be using journal entries this year to adjust program-related expenditures as the board has more time to reflect on legislative changes and adopts new goals. However, you can go ahead and create those new PICs within your accounting system and begin coding some expenditures. As you select things to code to new programs, consider the overarching goal of the program, the long term cost implications of new expenditures and future shifts the district might want to make, and the impact each program has on what you can spend for other program areas given that you can only code each expenditure to one program.

In addition to creating some new PICs, the legislature made some changes to old PICs. They modified the language around the bilingual education allotment so that you may soon be allowed to code a portion of teacher salaries to this code (note this is only the amount needed to reduce class size). We expect TEA may issue additional guidance about

how to calculate that later this year. The legislature also modified the use of compensatory education funds so that you can use the dollars to support low-income as well as at risk students. They also directed the Agency to consider ways of streamlining reporting without eliminating any previously allowed expenditures. The new language is somewhat broader than the old language so more supports and interventions for low-income and at risk students are likely to qualify, and so that it may be easier to account for expenditures in this area as long as they are targeted toward reducing the achievement gap.

Although guidance from TEA has not yet been finalized, we have created a matrix of some of the new codes (and old ones that sometimes overlap) that shows the code, its purpose and required spending amount, and some examples of things you might code there. This list is not meant to be exhaustive. You might well have ideas that would serve students better, and please use those and feel free to share them with us so we can let others know. The chart should also be considered **DRAFT** as some elements may need to change as TEA issues final guidance.

The important thing here is that you are able to account for the things you are doing for students that meet program goals. Doing so will be important in analyzing the effectiveness of your programs as well as in articulating to your community and to the legislature why program dollars are important to the district.

PIC	Spending Requirement	Intent	Examples
24 -- Compensatory Education 34 pre-k Compensatory Education 30 -- Title 1 School-wide	55 percent	Funds must be used to fund supplemental programs and services designed to eliminate disparity in performance on assessment instruments administered under Subchapter B, Chapter 39, or disparity in the rates of high school completion between students who are economically disadvantaged and students who are not and students who are at risk and students who are not.	Extended day or year programs for students who are low income or at risk; Supplies and materials designed to support struggling students (e.g. Read 180) ; Salary supplements for teachers working on campuses / in classrooms serving predominately low income / at risk students AVID or similar programs designed to support first generation to college students; Second half of the day pre-k for at risk or low income students (PIC 34)
32 -- pre-kindergarten	No Specific Requirement	Captures non-supplemental cost of pre-k	First half of the day teacher salaries, instructional materials, etc. for pre-k

36 -- Early Education Allotment	100 percent	Funds allocated must be used to fund programs and services designed to improve student performance in reading and mathematics in pre-kindergarten through third grade, including programs and services designed to assist the district in achieving the goals set in the district's early childhood literacy and mathematics proficiency plans adopted under TEC Section 11.185.	Second half of the day for pre-k Reading / math specialists for early grades Furniture / supplies and materials necessary for expansion of pre-k to second half of day Reading / math materials for k - 3 classrooms Reading academy participation for k - 3 teachers and principals Pre-k for non-eligible students
37 -- Dyslexia	100 percent	Funds should be spent on students identified as having dyslexia or related disorders. No more than 20% may be spent on contracting with a private provider for supplemental services	Instructional materials designed to support students with dyslexia; Assessment materials designed to identify students with dyslexia; Dyslexia service providers (teachers, instructional aides, etc.) Staff development for teachers designed to provide information on serving students with dyslexia; Contracting out for supplemental services (< 20%)
38 -- College, Career and Military Readiness	55 percent	Must be spent in grades k - 12 to improve college, career and military readiness outcomes	High school teacher salaries for college / career prep classes AVID or similar programs designed to support first generation students College / Career counseling designed to support first generation students; Teacher salaries for courses designed to prepare students for college / workforce

RESPONSIBILITES

Blue is the Professional – requires Role ID
Green is the Auxiliary – requires an Auxiliary Role ID

Job Duties	Role ID	Service ID	Pop Served	Object Code	Function
Non-Classroom Responsibilities - Professional and Auxiliary staff		**Monthly Minutes, Class ID, Class Type, and Student Count NOT Required**			
Superintendent	027	SS013000	01	6119	41
Asst. Superintendent	004	SS013000	01	6119	12,13,21,31-61,81
Instructional Administration / District Instructional Program Director	012	SS001000	01	6119	12,13,21,31
Principal	020	SS003000	01	6119	23
Assistant Principal	003	SS003000	01	6119	23
Business Manager/CFO	043	SS013000	01	6119	41
Business Services *Professional (including but not limited to Accounting, Budget, Professional Payroll staff)*	112	SS013000	01	6119	
Business / Finance - (Accounting clerk, Accounts Payable Clerk, Payroll Clerk, Purchasing Clerk)	201			6129	
Campus Office /Clerical (Receptionist, Secretary, Certification Specialist, Bookkeeper, Data Clerk, PEIMS Data Clerk, Registrar)	202			6129	
Central Office /Clerical (Receptionist, Secretary)	203			6129	
Counselor *New rule: If ROLE-ID is "008", then the following must be blank: CLASS-ID-NUMBER, NUMBER-STUDENTS-IN-CLASS, and CLASS-TYPE-CODE. 30090-0104 New rule: If ROLE-ID is "008", then MONTHLY-MINUTES must not be blank. (See Non-Classroom Responsibility Samples Document for Minutes*	008	SS007000	01	6119	31
Human Resources	045	SS013000	01	6119	41
Human Resources (Certification Specialist, Human Resources Specialist)	205			6129	
Dyslexia – PIC: 36					
District Registrar	055	SS013000	01	6119	23, 41
Campus Registrar	055	SS003000	01	6119	23
PEIMS Coordinator	106	SS025000	01	6119	
Nurse (RN,LVN) – Health Svc	022	SS009000	01	6119	33
Librarian	013	SS002000	01	6119	12
Truant Officer	030	SS020000	01	6119	32
Security (*Including but not limited to Chief of Police, Investigators, Police Officers*)	105	SS021000	01	6119	52
Safety/Security	220			6129	
Food Service/Cafeteria (*Including but not limited to Dietician*)	107	SS012000	01	6119	35
Child Nutrition	204			6129	
Athletics (Other than Athletic Director)	109	SS011000	01	6119	36
Athletic Director	040	SS011000	01	6119	36
Athletic Trainer	056	SS011000	01	6119	36

	Role ID	Monthly Minutes, Class ID, Class Type, and Student Count Required	Population Served	Classroom Position	Function
`Custodial	110	SS014000	01	6119	51
Custodial	213			6129	51
Maintenance	111	SS014000	01	6119	51
Maintenance	214			6129	51
Plumber	215			6129	51
Painter	216			6129	51
HVAC	217			6129	51
Electrician	218			6129	51
Warehouse	219			6129	
Transportation – to and from school only	108	SS010000	01	6119	34
Transportation	221			6129	34
District / Campus Technology Professional (*Including but not limited to Programmer/Analyst, Network Specialist, Database Administrator, PEIMS Coordinator, Other*)	106	SS025000	01	6119	
Campus Technology Specialist	207			6129	
Information Technology (Computer Tech, District PEIMS Data Coordinator, Help Desk Tech, Telecommunication Tech)	206			6129	
Department Head / Chair	054	SS006000	01	6119	13, 21
Other District Exempt Professional Auxiliary – Assign this role to district staff who are professional-level, non-instructional staff who cannot be classified in any other role regardless of where assigned. Physical work location is not a determining factor.	113			6119	
Other Non-Exempt Auxiliary (Volunteers)	222			6129	

Classroom Professional	Role ID	Monthly Minutes, Class ID, Class Type, and Student Count Required	Population Served	Class-room Position	Function
Occupational Therapist	016	SE000001	06	02	11
Speech Pathologist/Therapist	026	SE000002	06	02	11
Teacher	087	Course Service ID	*	**	11
Teacher (Self-Paced/Online Classroom)	087	SR000005	*	02	11
DAEP Teacher of Record	087	Course Service ID	*	02	11
Long Term Substitute	047	Course Service ID	*	**	11
***WBL Site Coordinator	032	12701300 and/or 12701400	05	01	11
Certified Interpreter	036	SA000004			11
Head Coach	087	Course Service ID	01	01	11

Classroom Para-Professional OR Professional	Role ID	Monthly Minutes, Class ID, Class Type, and 000 Student Count Required	Population Served	Class – Room Position	Function
PK Classroom Aide	033	SA000003	01	05	
Regular Ed Classroom Aide	033	SA000003	01	01	11
Spec Ed Classroom Aide	033	SA000003	06	**	11
Pull Out Teacher	087	Course Service ID	*	**	11
Floating Sub/Permanent Sub	047	SR000007	01	01	11
Assistant Coaches	087	Course Service ID	01	01	11
Discipline Management/Disc Setting/ISS	087	SR000001	01	02	11
DAEP Not Teacher of Record	087	SR000001	01	02	11

* Based on population of class (C030 Table)
** Based on type of classroom (C179 Table)

*** WBL Site Coordinator will have 090 for classes (Role 087 or 047) + 090 for Site Visits (Role 032)
X Based on Department - Refer to C022 Table