PEIMS Fall Submission 1

- **PEIMS Responsibilities and Requirements**
- **Uploading PEIMS Data**
- **Promoting PEIMS Data**
- **Validating PEIMS Data**
- **Searching PEIMS Data**
- **Verifying PEIMS Reports**
- **Preparing/Finalizing PEIMS Data**

TSDS PEIMS Fall Submission 1

TSDS PEIMS – Submission Responsibilities & Requirements

The Texas Student Data System (TSDS) is a statewide system for collecting and reporting education data for Texas publicly funded schools.

2022-2023 PEIMS Fall Submission Timeline

PEIMS Fall Submission (Sub 1)	
TSDS PEIMS ready to load data to eDM	August 1, 2022
PEIMS Fall submission ready for users to promote data	September 12, 2022
Close of school-start window - Last Friday in September	September 30, 2022
PEIMS Fall snapshot date	October 28, 2022
TSDS PEIMS Fall ready for users to complete, approve, and accept submissions	October 31, 2022
Requests to retire Unique IDs due at TEA for PEIMS Fall first submission	December 2, 2022
PEIMS Fall first submission due date for LEAs and ESCs	December 8, 2022
Requests to retire Unique IDs due at TEA for PEIMS Fall resubmission	January 13, 2023
PEIMS Fall resubmission due date for LEAs and ESCs	January 19, 2023
PEIMS Fall data available to customers	February 16, 2023

TSDS TWEDS – Texas Education Data Standards

The data submitted through TSDS must be in XML format as defined in TEDS (Texas Education Data Standards). The TEDS is located on the TSDS website.

http://www.texasstudentdatasystem.org/TSDS/TEDS/TEDS_Latest_Release/

TEDS 2022-2023	Released
TSDS TEDS Change Logs	9/15/2022
2022-2023 Texas Education Data Standards via TWEDS	9/15/2022

According to TEDS the LEAs (Local Education Agencies) are responsible for:

- Submitting current, complete, and accurate data for all XML files required for each submission
- Validating and editing data according to the business rules and validations
- Correcting all errors during the validation process
- Delivering "fatal-free" corrected PEIMS data on or before any due dates set by the ESC or TEA.

TSDS TWEDS – eDM Dictionaries and Guides

TEDS provides error dictionaries to assist in translating and troubleshooting errors in File Manager and Batch Manager as well as guides for deleting/reloading data. There is also a guide that cross-references validation rules with the associated elements and interchanges.

eDM	Released
eDM Error Dictionary (XLS)	10/10/2018
eDM Error Dictionary - Batch Manager (PDF)	10/10/2018
eDM Error Dictionary - Duplicates (PDF)	10/15/2018
eDM Error Dictionary - File Manager (PDF)	10/10/2018
eDM Error Dictionary - Reference Guide (PDF)	10/10/2018
Delete Utility Reload Guide (PDF)	09/22/2020
Field Validation Rule Interchange Guide (PDF)	10/10/2018

TSDS – PEIMS Access and User Roles

The TSDS PEIMS application is only available to authorized ESC, district, and campus staff. A TEAL logon is required as well as access to the Texas Student Data System Portal. Different roles can be assigned to the user based on the access required. There are seven different roles in the PEIMS application, each with a different level of access.

- **ODS Data Loader (ESC/LEA)** – This role allows the user to upload PEIMS Interchanges to TSDS.
- **PEIMS Campus Submitter (Campus)** – This role allows the user to promote loaded data, validate (prepare) data, search all PEIMS data, and view PEIMS reports for a specific campus.
- **PEIMS Data Submitter (LEA)** - This role allows the user to promote loaded data, validate (prepare) data, search all PEIMS data, and view PEIMS reports at the district level.
- **PEIMS Data Completer (LEA)** – This role allows the user to promote loaded data, validate (prepare) data, complete (finalize) data, search all PEIMS data, and view reports at the district level.
- **PEIMS Data Approver (LEA Superintendent)** – This role allows the Superintendent to approve the PEIMS data submission and apply for an extension if necessary.
- **PEIMS Data Accepter (ESC)** - This role allows the user at the ESC to view and run reports, accept, or reject the PEIMS data submission.

Downloading Validation Tool

TEA provides a **Validation Tool** to validate the format and naming conventions for the PEIMS interchanges. The Validation Tool is in **TEAL > Texas Student Data System Portal > Utilities** for downloading.
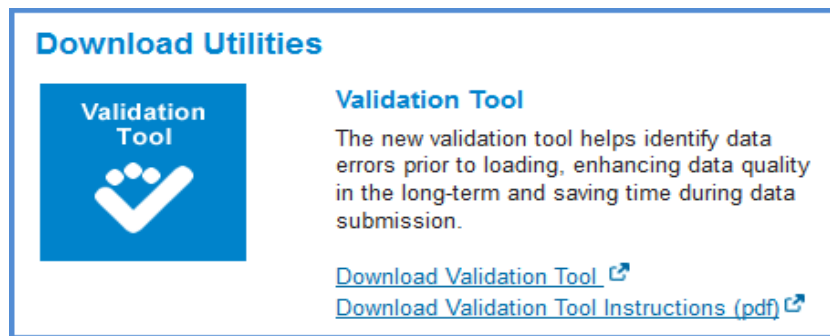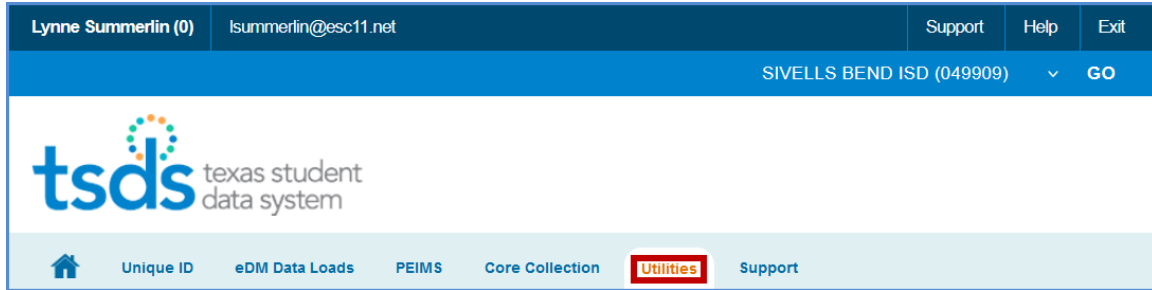
- Click **Download Validation Tool** to download the tool.
- Click **Download Validation Tool Instructions (pdf)** to download a copy of the installation instructions.

Note: If you have previously installed the Validation Tool, the **Check for Updates** option in it does not update to the most current version. You must download and install the Validation Tool again.

Validating PEIMS Interchanges – Validation Tool

Once the Validation Tool has been downloaded and installed click on the validation tool icon to open the tool.

- Select **File > Validation Tool**. The Validation Tool opens in a separate window.

- Select the **School Year 2022-2023**.
- Select the **Collection**.
- Click the **folder icon** to browse for and select the PEIMS files (files must be unzipped).
- Click **Process Files**. The results of the validation are reported in the status field.
- If you have files that **Fail**, you can click on the file name and click the **Details** button.

- The Detail Errors page appears, errors can be viewed on the screen by selecting Error Type (All, Fatal, Warning, or Special Warning).
- Errors may also be printed by selecting **Print All Errors** or saved in Excel format by selecting **Export All Errors**.
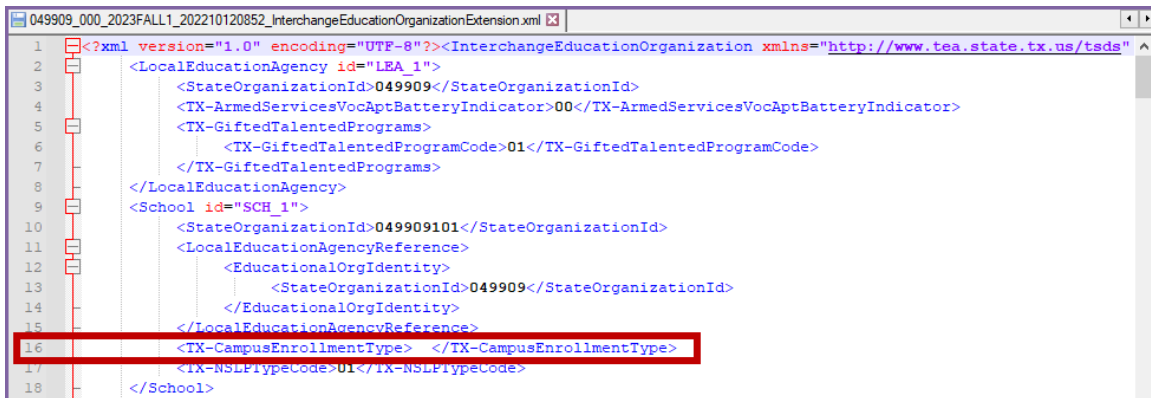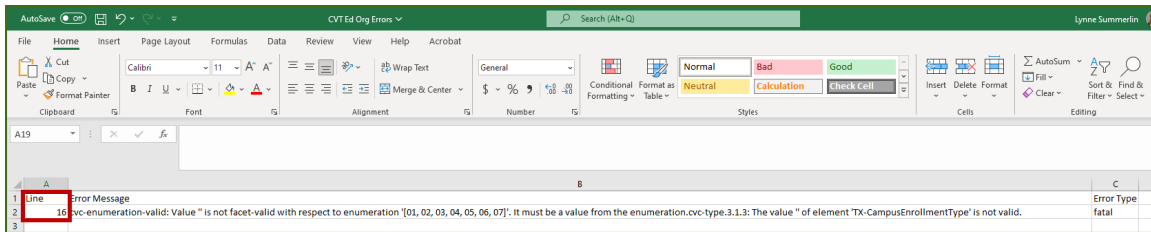
- Files can be manually loaded in TSDS by clicking on the **Open TSDS** button. This will take you to the TEAL login screen.

Note: Failed files will not load in TSDS. Files with errors will load, but errors will need to be corrected prior to finalizing the PEIMS Submission.

Uploading PEIMS files – TSDS PEIMS Data Upload

The TSDS portal is the way to access any of the TSDS applications or utilities to which users have access. The tabs that appear on the portal depend upon the access that t been granted in TEAL.

The eDM Data Loads tool allows users to load data from their local systems to TSDS.

- Once logged into **TEAL** and select **Texas Student Data System Portal**.
- On the Home screen select **Manage Data Loads**.
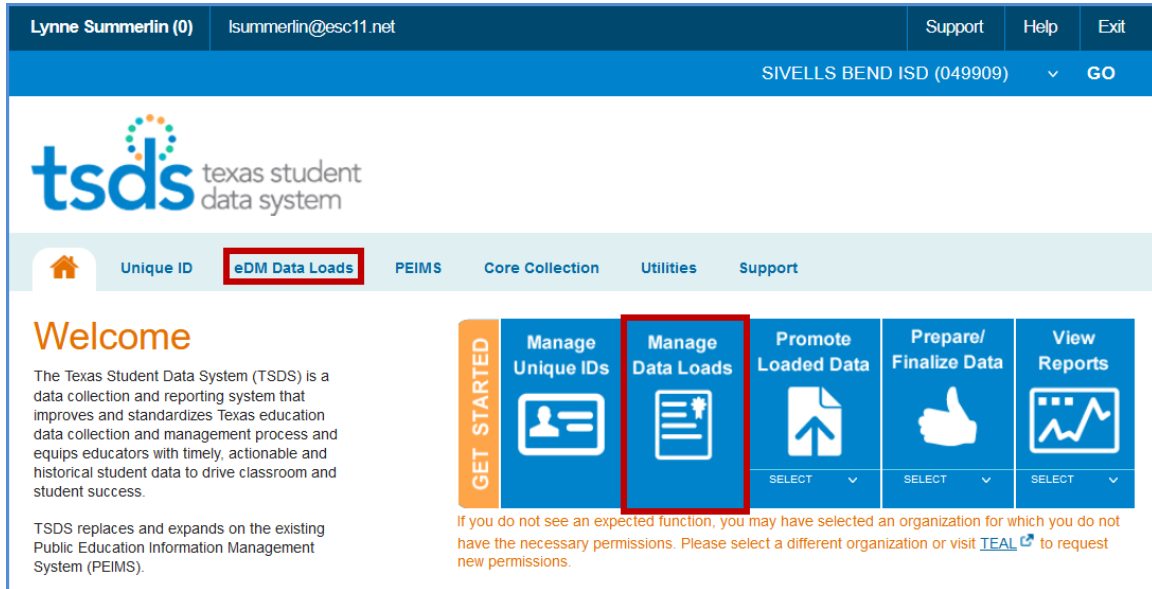
- Under **Interchange Menu**, select **Interchange Upload.**
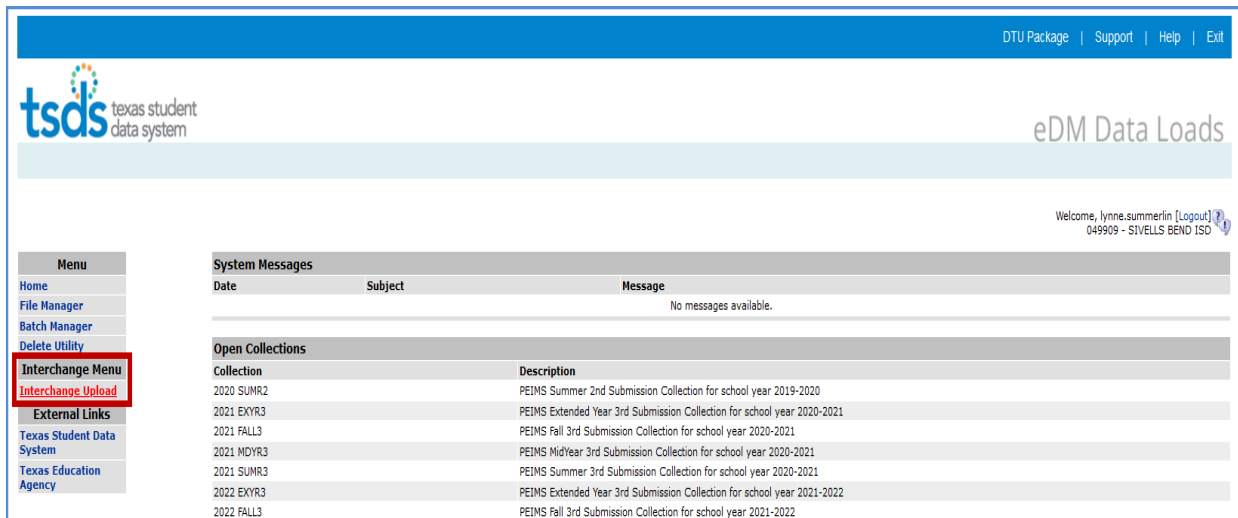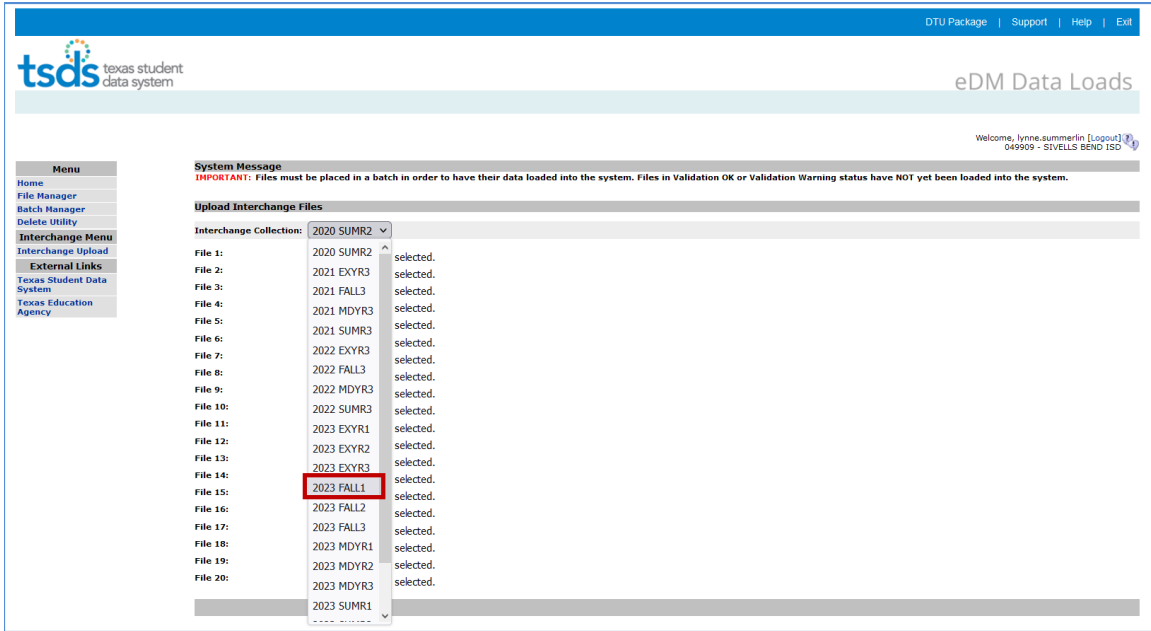
- Select the **Interchange Collection** from the drop-down menu.
- Click the **Browse** button for **File 1** and select the file from your computer.
- Click the **Browse** button for **File 2** and select the next file from your computer.
- Continue until all require files have selected.

  Note: The files must be loaded in the following order:

  - **InterchangeEducationOrganizationExtension**
  - **InterchangeStudentExtension**
  - **InterchangeStudentEnrollmentExtension**
  - **InterchangeStaffAssociationExtension**
  - **InterchangeStudentProgramExtension**
  - **InterchangeSSAOrganizationAssociationExtension**
  - **InterchangeFinanceExtension**

- Click **Upload.** The files are validated and uploaded to the File Manager.

Note: Files can be zipped for easier upload. Select all files, right-click, and send to > Compressed (zipped) folder. Upload the one file.

- Once the files have been completely uploaded, the **File Manager** screen appears.

- The files will be processed for errors.

➢ Any failed files will not batch.

➢ Any files with errors will have a red in the status column. To view errors click on the spyglass and scroll to the bottom of the screen and open the **.TAB** file.

➢ Make all corrections necessary in the software, run the Validation Tool again, and resubmit the files.

- Once all the files have a green checkmark in the status column, select all of the files and click **Add to Batch**. The **View Batch** button appears.

- Select the **View Batch** button.
- From the next screen the user may add comments regarding the batch, remove files from the batch, delete files, or process the batch. It is suggested that comments be added naming the file if the files are being uploaded manually.
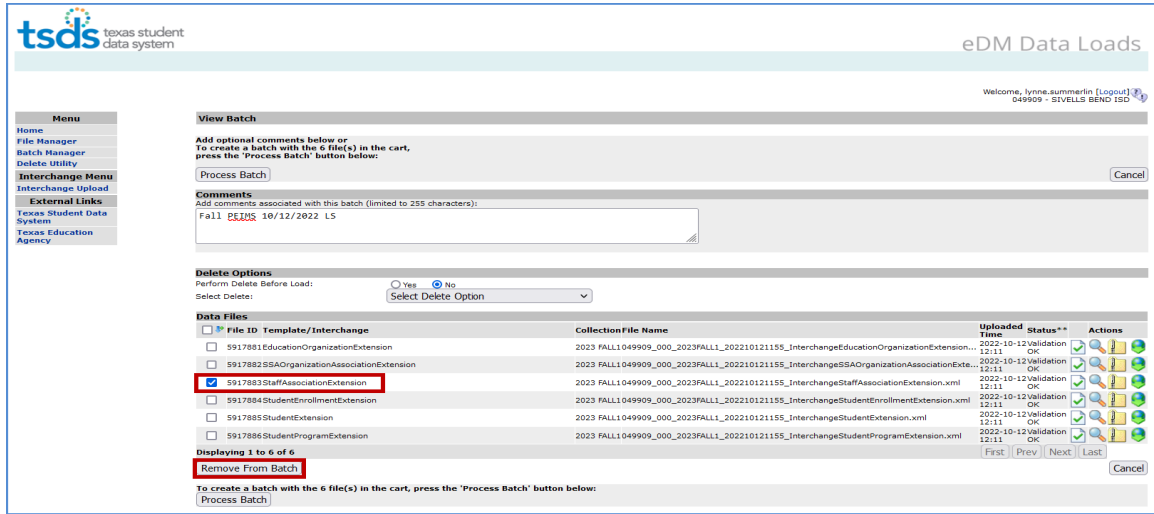
- To remove files from the batch, select the appropriate files and click **Remove from Batch**.
- The selected file is removed from the View Batch screen but remains in the File Manager.
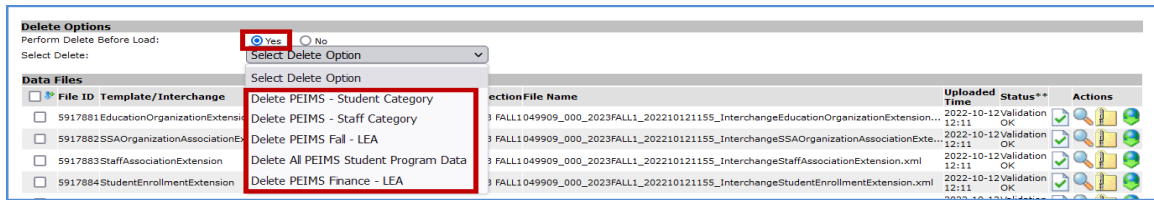
- Districts can delete data prior to processing the new batch. The Delete Utility has been integrated into the Batch Manager process.
- To delete data, select **Yes** by **Perform Delete Before Load**.
- From the **Select Delete Option** pulldown, select the data to be deleted.
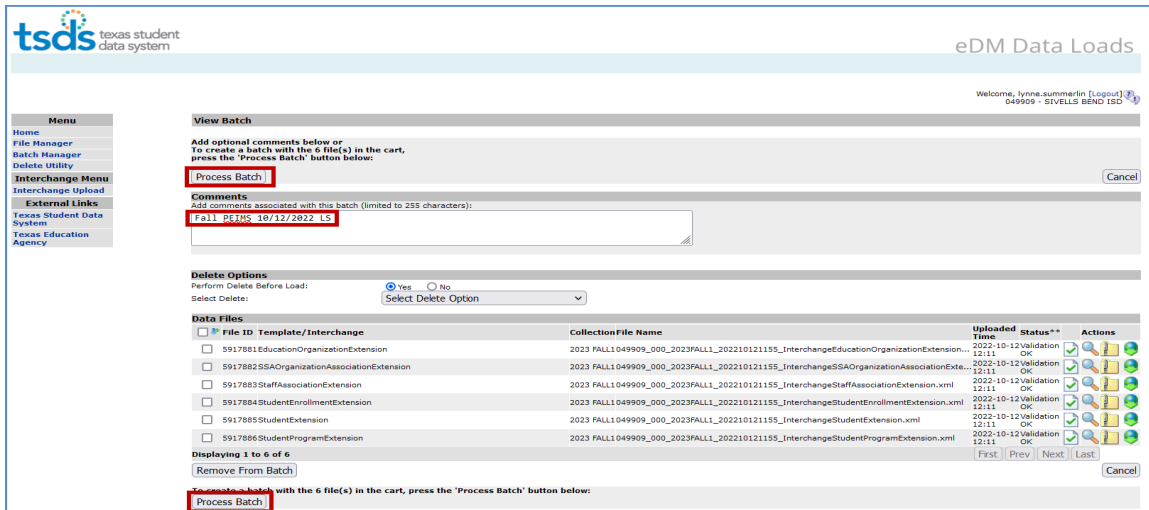
- To process the batch, select the appropriate files and click **Process Batch**. The **Batch Manager** screen appears:

- The **Batch Manager** screen appears with a list and status of all batches that have been processed. Batches can have a completed status with errors (**red X**) or no errors (**green checkmark**).

- To view the files with errors, click the spyglass to open the batch and then click on the spyglass next to the file with errors; or
- Click on **Download All Error Files**.

- To view the actual errors, click on the spyglass next to the **ERROR.TAB** file or the **DUPLICATES.TAB** file.

- Click **Cancel** to return to previous screens.
- Make corrections as needed in the software, create new interchanges, validate again, and resubmit the files.
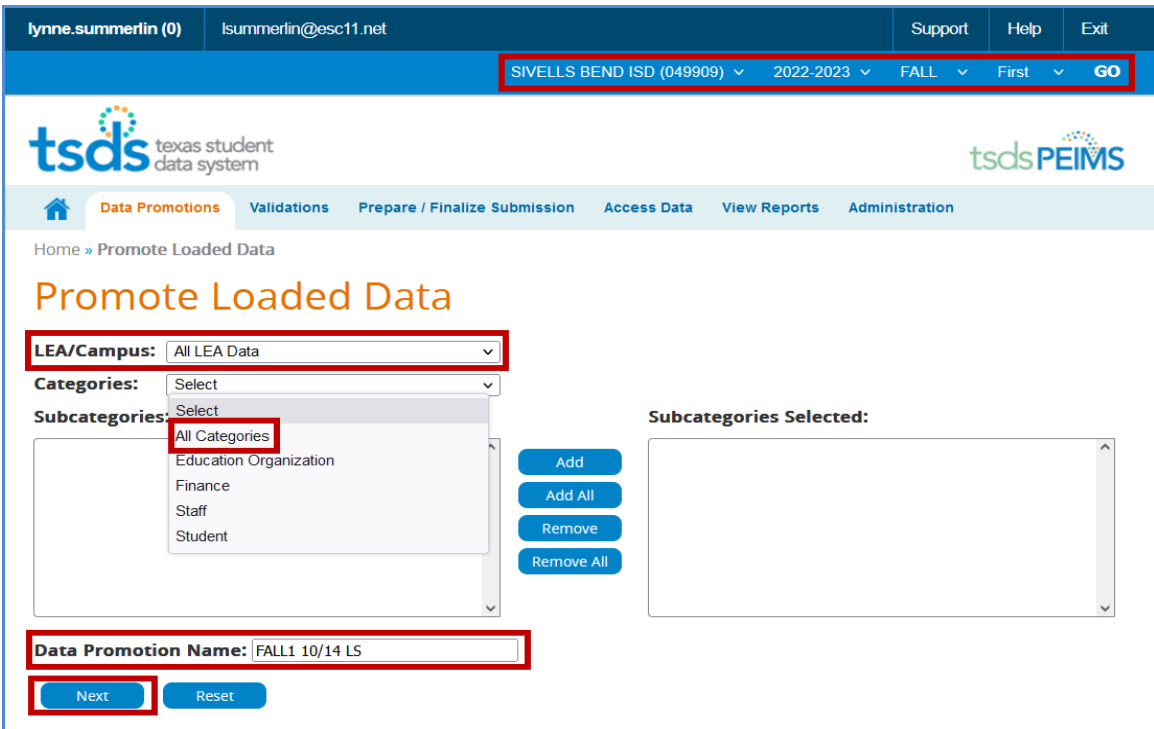- **Logout** and **Exit** programs.

Promoting PEIMS files – TSDS PEIMS Promote Loaded Data

The eDM Promote Loaded Data tool allows users to promote data that has been loaded and batched.

- Log in to **TEAL** and select **Texas Student Data System Portal**.
- On the Home screen select **PEIMS>Promote Loaded Data**.
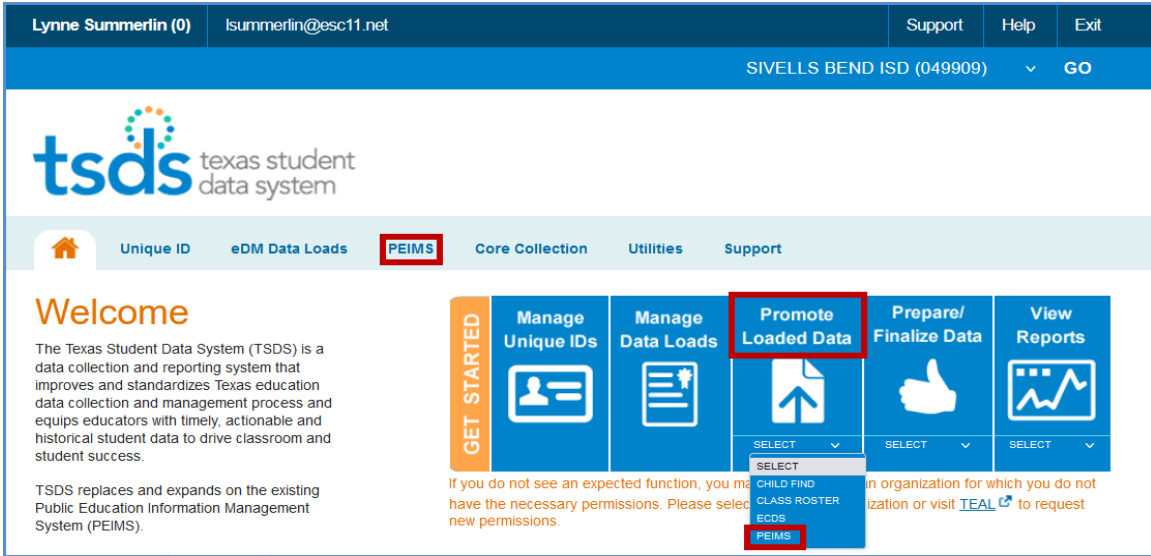
- The **Data Promotion** screen appears:

- Verify the correct submission is selected. If not, select it from the pull-down menu and click **GO**.
- From the **Categories** pull-down menu, select **All Categories** or the **individual categories** to be promoted. If individual categories are selected user may also select individual subcategories.
- Enter a **Data Promotion Name.**
- Click **Next** to continue or **Reset** to clear selections.
- The **Confirm Data Promotion** screen appears:

- Verify the **Categories/Subcategories.**
- Click **Submit**, **Cancel**, or **Back**.
- The **Monitor Data Promotions** screen appears:

- This screen shows the status of the data promotion, promotion error reports, and a confirmation message that the data was promoted.
- To view promotion errors, click the **View** link under Error Report or click the **LEA Promotion Errors** button.
- The **LEA Data Promotion Errors** screen appears:

- This screen will list any errors by Category, Subcategory, Severity, along with the error message. Errors can be saved as a PDF or XLS file or can be printed by selecting the appropriate button.

Validating PEIMS files – TSDS PEIMS Promote Loaded Data > Validations

This screen allows users to validate data that has promoted in TSDS. This is where the district will be able to view the Fatals, Warnings, and Special Warnings for the submission.

- Log in to **TEAL** and select **Texas Student Data System Portal**.
- On the Home screen select **Promote Loaded Data**. Select the Validations tab > Validate Submission Data.

- From the **Categories** pull-down menu, select **All Categories** or the **individual categories** that are to be validated.
- Select the type of validation (**Fatal, Warning, Special Warning**).
- Enter a **Validation Name**.
- Click **Next** to continue the process or **Reset** to clear all options.

- The **Confirm Data Validation** screen appears:

- Verify the **Categories/Subcategories**
- Click **Submit**, **Cancel**, or **Back**.
- The **Monitor Data Validations** screen appears:

- This screen shows the status of the data validations, validation error reports, and a confirmation message that the data has been submitted.
- To view validation errors by job, click the **LEA Validation Errors** button or **View** under Error Report.

- This screen will list any errors by Category, Subcategory, Severity, along with the error message.
- Errors can be sorted by the individual columns. The errors can also be saved as a PDF or XLS file or can be printed by selecting the appropriate button.
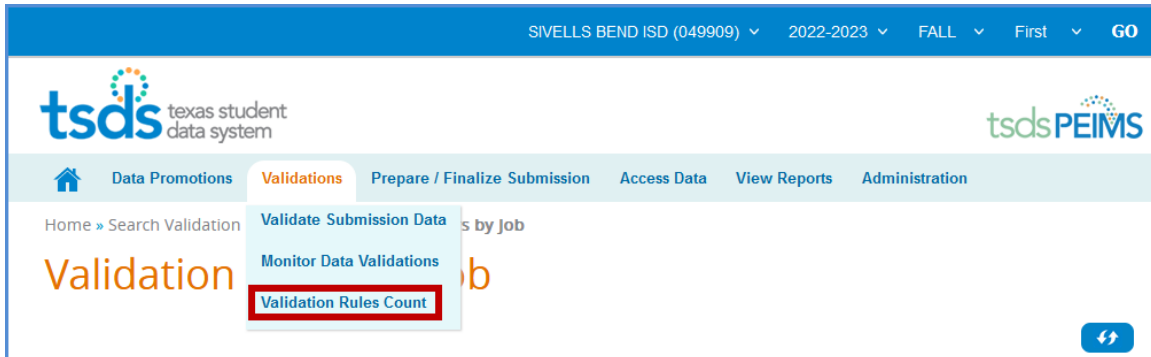
- To view errors by severity (Fatal, Special Warning, and Warning) select **Validation Rules Count** from the Validations pull-down.

- Click on the "**Show**" link to view errors.

Validation Rules Count

Home » Validation Rules Count

Validation Rules Count

Fatals (1283)

Hide Fatals

Show 50 entries   Search Table: _____   PDF XLS Print

| Rule#	Description	Count
40110-0126	40110-0126: If a student's age on September 1 of the current school year is 5, and GRADE-LEVEL-CODE is "PK", then ADA-ELIGIBILITY-CODE must be "4" or "5".	42
41163-0001	41163-0001: For each student Special Education program association, there must be a student program with a matching TX-UNIQUE-STUDENT-ID where SPECIAL-ED-INDICATOR-CODE is "1".	13
40100-0206	40100-0206: If STUDENT-CENSUS-BLOCK-GROUP is not blank, then the first two characters of STUDENT-CENSUS-BLOCK-GROUP must be "48", "05", "22", "35", or "40".	5
20030-0003	20030-0003: There must be Budget data where FUNCTION-CODE is 41.	1
20030-0001	20030-0001: There must be Budget data where FUND-CODE is 199 and OBJECT-CODE is 5XXX.	1
30090-0001	30090-0001: Except for Texas School for the Deaf (227906), Texas School for the Blind and Visually Impaired (227905), and Texas Juvenile Justice Department (227622), each Local Education Agency's data submission must contain a staff responsibility for each responsibility that can be specified using the roles and services found in the Data Standards code tables for each professional and each paraprofessional.	1
41163-0018	41163-0018: If PPCD-SERVICE-LOCATION-CODE is not "0", then age must be 3, 4 or 5 on the PEIMS fall snapshot date.	16
40110-0002	40110-0002: If SPECIAL-ED-INDICATOR-CODE is "1", then there must be a Special Education program association reported with a matching TX-UNIQUE-STUDENT-ID.	1
41163-0030	41163-0030: If age is at least 3 on the PEIMS fall snapshot date and less than 22 on September 1, then CHILD-COUNT-FUNDING-TYPE-CODE must not be "0".	2
40100-0167	40100-0167: For a particular TX-UNIQUE-STUDENT-ID, there must be one and only one Enrollment (Student School Association).	2
40100-0125	40100-0125: If AS-OF-STATUS-CODE is "X", then GRADE-LEVEL-CODE must be "EE", "PK", "KG", or "01"-"07".	2
40100-0126	40100-0126: If AS-OF-STATUS-CODE is B, D, F, or X, then there must be student program data with a matching TX-UNIQUE-STUDENT-ID.	2

- Correct any fatals. Verify or correct any warnings or special warnings in the database, re-create the files, upload, and promote and validate the data.

Note: It is recommended that the district use the Delete Utility in TSDS > Manage Data Loads to clear the incorrect data from the ODS prior to uploading the new files.

TSDS – Search Data - TSDS PEIMS Promote Loaded Data>Access Data

To access the data or student rosters, click on the **Access Data** tab and then select either **Search Submission Data** or **Search Student Roster**.
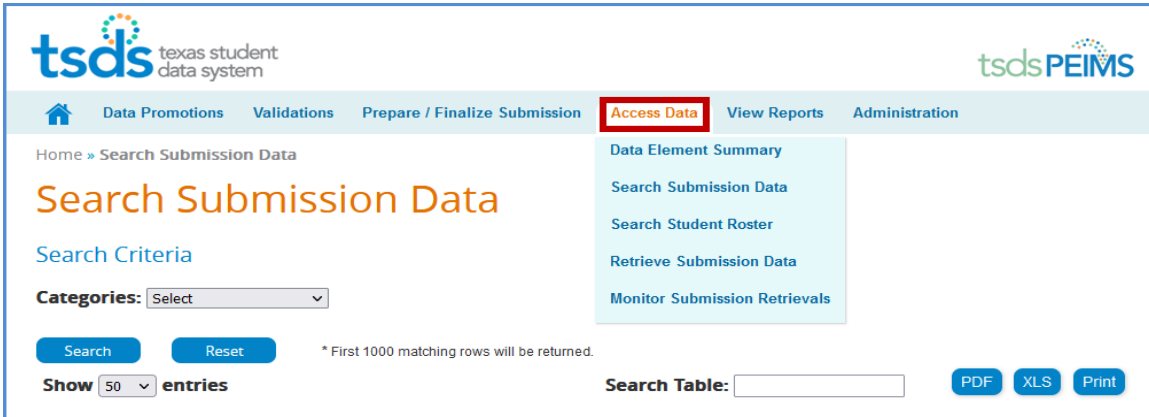
Accessing PEIMS data using Search Submission Data
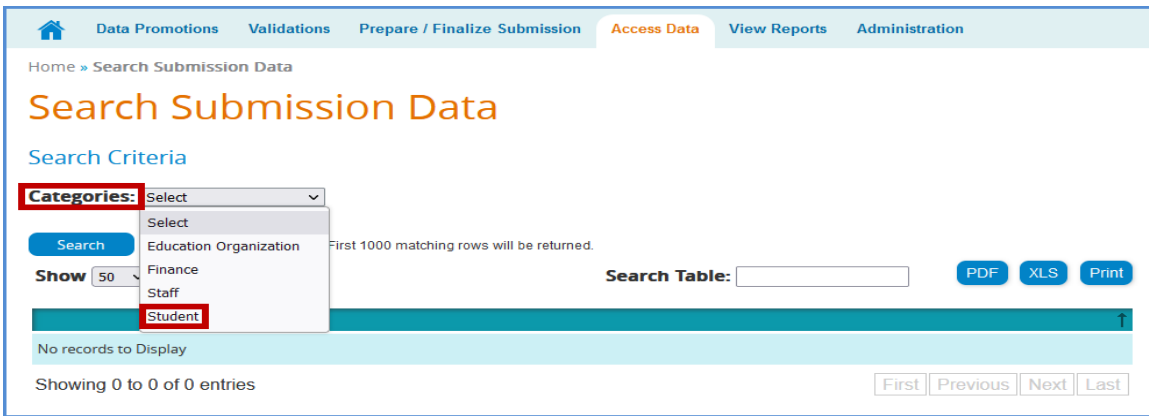
- On the **Data Search** screen, select the search category from the **Categories** pull-down menu. The Subcategories field appears:
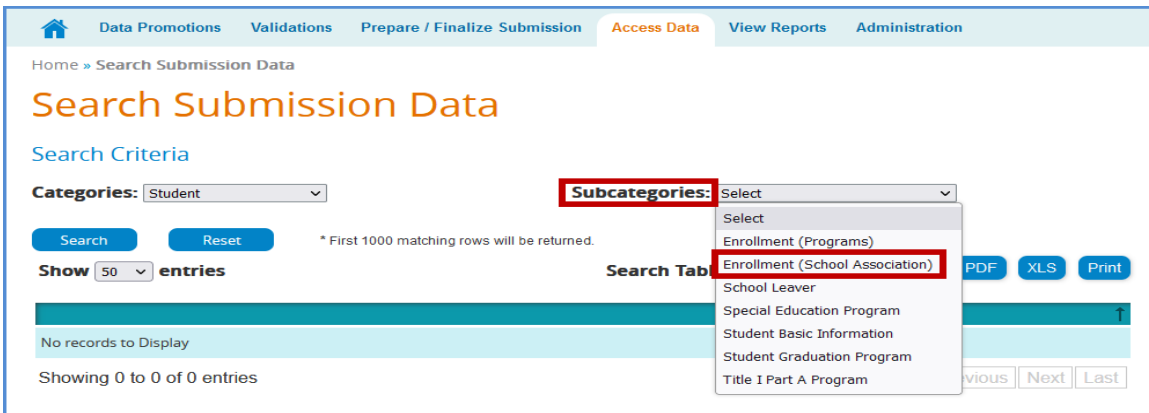
- Select a **Subcategory** from the pull-down menu if required. Once selected, additional fields appear based on the original category and subcategory selected.

- Click **Search** to view data matching entered criteria or click **Reset** to clear selected criteria.

- **Show entries** allows the user to select up to 500 entries to view at a time.
- The **Search Table** field allows the user to filter the search by fields. An example would be to search for only 8th grade (enter 08 in the field).
- The search results can be **Printed**, saved/printed as a **PDF** or **XLS**.
- The search results can be sorted by the individual columns by clicking on the column header.

Accessing PEIMS data using Search Student Roster

This search is used to help districts with their Leaver data. The only students that can be searched on this screen are students that are grade levels 7-12 and are being reported as leavers.

- Enter search criteria. Any field with a red asterisk (*) is a required field.

TSDS – PEIMS View Reports

Reports must be run and verified prior to and after completing and accepting the PEIMS data submission. These reports are the same as the reports in Edit+ and must be compared for accuracy of the submission. The TSDS PEIMS reports are separated into three categories:

- **Standard Reports** – These reports are available at any time and reflect the current data loaded into PEIMS, whether the collection has been completed or not.
- **Special Reports** – These reports are summary reports that help completers, approvers, and accepters review the data submission. These reports also are available at any time and reflect the current data loaded into PEIMS, whether the collection has been completed or not.
- **Student Leaver Reports** – These are the individual LEA reports that use data from across the state to help districts identify their leavers. These reports are only in each submission after the submission has closed and TEA has calculated the leavers. These reports only reflect finalized data.
- **UID Discrepancies** – These reports are used to identify discrepancies between Unique ID data and PEIMS Demographic data.
- **Bundled Reports** – These are reports that are generated together for ease of downloading.

To access the reports:

- Log in to **TEAL** and select **Texas Student Data System Portal**.
- On the Home screen select **View Reports**. Select the View Reports tab.

Under **View Reports**, select from the pull-down menu the report to run in the appropriate
category.

Special Reports

Summary reports that help completers, approvers, and accepters review a collection. Availability: These reports are available at any time and reflect the current state of the data.

Select	▼
Select
District Level QA
Student Graduate
Summary

UID Discrepancies

Reports for verification for Discrepancies from Unique ID data and TSDS Demographic data

Select	▼
Select
Staff Discrepancy
Student Discrepancy

Student Leaver Reports

Individual LEA reports that use data from across the state to help LEAs identify their leavers. The reports only display accepted data. Availability: In Fall 1st Submission and in the Accepted Submission.

Select	▼
Select
Presumed Record Submission Support
Record Submission Support

Statewide Reports

Individual LEA reports that use data from across the state to provide data that is relevant for the LEA (for example, the fiscal SSA and duplicate student reports). The reports only display accepted data. Availability: After 1st Submission, Resubmission, and in the Accepted Submission.

Select	▼
Select
Duplicate Enrollment
General

Bundled Reports

Groups of reports generated together for ease of downloading.

Select	▼
Select
LEA Bundles

- Click the circular arrow under **Run**. The **Report Parameters** screen appears:

- Reports can be run by district or campus by changing the Organization Level selection.
- Select the appropriate parameters and click **Run**. The **View Reports** page appears showing the status of the report. The reports are associated to the individual user to prevent other users from overwriting the reports.

| 🏠 | Data Promotions | Validations | Prepare / Finalize Submission | Access Data | View Reports | Administration |

Home » View Reports

View Reports

✓ You have successfully initiated report PDM1-120-004. Once it has generated, click the DOWNLOAD link to view your report.

Standard Reports

The core group of PEIMS reports. Availability: These reports are available at any time and reflect the current state of the data.

[Student ▾]

Hide Reports List

Report # ↑	Report Name ↕	XLS		PDF		CSV	
		Status	Run	Status	Run	Status	Run
PDM1-120-001	Students by Sex, Ethnicity, and Grade				⟳		
PDM1-120-002	LEP/BIL/ESL and Parental Denial Students by Program and Grade				⟳		
PDM1-120-003	Student Program Roster				⟳		
PDM1-120-004	Student by ADA Eligibility and Grade			IN PROGRESS			
PDM1-120-005	Student Data Review				⟳		

- Once the report is complete a hyperlink will appear allowing the report to be downloaded.

Report # ↑	Report Name ↕	XLS		PDF		CSV	
		Status	Run	Status	Run	Status	Run
PDM1-120-001	Students by Sex, Ethnicity, and Grade				⟳		
PDM1-120-002	LEP/BIL/ESL and Parental Denial Students by Program and Grade				⟳		
PDM1-120-003	Student Program Roster				⟳		
PDM1-120-004	Student by ADA Eligibility and Grade			DOWNLOAD	⟳		
PDM1-120-005	Student Data Review				⟳		

     Created on 11/13/2014
Revised 10/12/2022

TSDS – PEIMS Prepare/Finalize Process (Sample Screenshots)

Once data has been validated, the district will prepare and finalize the data which will include completing the process so that the ESC PEIMS coordinator can verify the submission. From this screen the district PEIMS Data Completer can lock categories once the categories are fatal free to prevent the data being overwritten.

- Log in to **TEAL** and select **Texas Student Data System Portal**.
- On the Home screen select **Prepare/Finalize Data**.
- Verify that PEIMS is selected from the pull-down menu (if applicable).
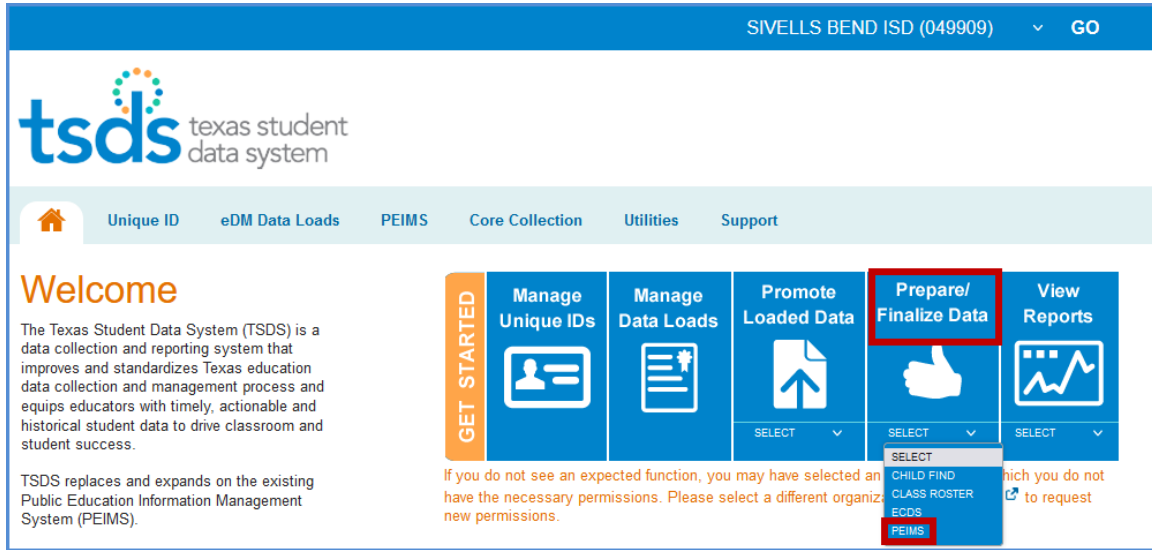
- Verify the correct collection has been selected.
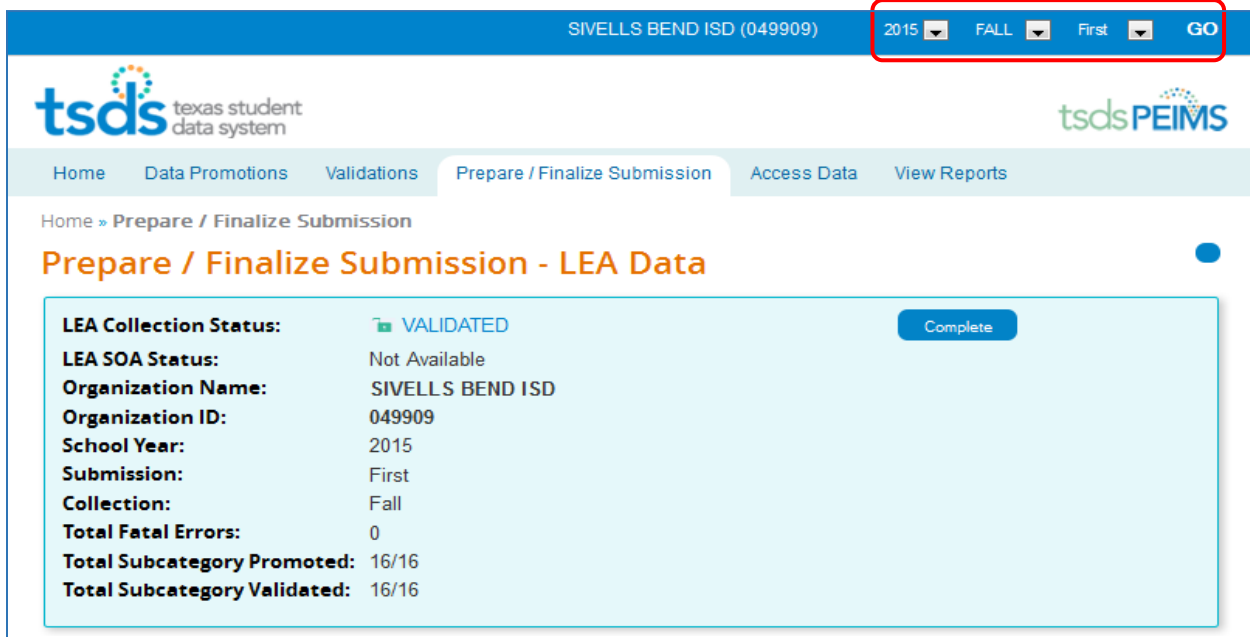
| Home | Data Promotions | Validations | Prepare / Finalize Submission | Access Data | View Reports |

Home » **Prepare / Finalize Submission**

Prepare / Finalize Submission - LEA Data

LEA Collection Status:	📦 VALIDATED	[Complete]
LEA SOA Status:	Not Available	
Organization Name:	SIVELLS BEND ISD	
Organization ID:	049909	
School Year:	2015	
Submission:	First	
Collection:	Fall	
Total Fatal Errors:	0	
Total Subcategory Promoted:	16/16	
Total Subcategory Validated:	16/16	

[Verify] [Reset Verify]

Show [50] entries   Search Table: [   ]   [PDF] [XLS] [Print]

Select ☐	Category	Subcategory	Last Promoted On	Promoted By	Records	Error Report	F	SW	W	Data Status
☐	Staff	Staff Basic Information	01-29-2015 03:14:46 PM	lynne.summerlin	14	View	0	1	0	VALIDATED
☐	Staff	Employment – Payroll Summary	01-29-2015 03:01:58 PM	lynne.summerlin	13	View	0	0	0	VALIDATED
☐	Staff	Payroll	01-29-2015 03:15:41 PM	lynne.summerlin	34	View	0	3	0	VALIDATED
☐	Staff	Contracted Instructional Staff	01-29-2015 03:01:57 PM	lynne.summerlin	0	View	0	0	0	VALIDATED
☐	Staff	Responsibility	01-29-2015 03:11:25 PM	lynne.summerlin	79	View	0	0	0	VALIDATED
☐	Finance	Budget	01-29-2015 03:16:11 PM	lynne.summerlin	69	View	0	1	0	VALIDATED
☐	Education Organization	Local Education Agency	01-29-2015 03:15:37 PM	lynne.summerlin	1	View	0	0	0	VALIDATED

- This screen shows records by **Category** and **Subcategory**.
- In the **Last Promoted On** column is the time date stamp for the last time the data was promoted to PEIMS.
- **Promoted By** lists the user name of the person that last promoted the data.
- The number of records for the particular Category/Subcategory is listed in the **Records** column.
- Click **View** in the **Error Report** field to view the Fatal, Special, and Warning errors for the particular Category/Subcategory.
- The number of errors by Category/Subcategory are listed under the columns labeled:

  ➢ **F** (Fatal)
  ➢ **SW** (Special Warning)
  ➢ **W** (Warning)

The current status (Promoted, Validated, etc.) of the Category/Subcategory is listed under the column **Data Status**.

- The data on the screen can be saved/printed in **PDF** or **XLS** by clicking on the appropriate button.
- A search can be done on the screen by using the **Search** field.
- To verify or "lock" data, the category/subcategory must have a **Data Status** of **Validated**. Click the checkbox adjacent to the Category/Subcategory that needs to be verified and click **Verify**.
- To "unlock" data, click the checkbox adjacent to the Category/Subcategory that needs to be unlocked and click **Reset Verify**.

- The PEIMS Data Completer can click the **Complete** button to complete the file so the ESC can verify data. All files must be fatal free in order to complete the files. The Completion Process Status bar appears:

Prepare / Finalize Submission - LEA Data

Completion Process Status:

63% Validation Complete (10/16)

LEA Collection Status: 📄 COMPLETION IN PROGRESS   Complete

LEA Collection Status:	📄 COMPLETION IN PROGRESS Complete
LEA SOA Status:	Not Available
Organization Name:	SIVELLS BEND ISD
Organization ID:	049909
School Year:	2015
Submission:	First
Collection:	Fall
Total Fatal Errors:	0
Total Subcategory Promoted:	16/16
Total Subcategory Validated:	16/16

☑ By checking this box, I acknowledge that all data included in the submission has been validated and reviewed for accuracy and authenticity. All Special Warnings and Warnings have been reviewed and confirmed.

Confirm   Cancel

- Once validation process is complete, check the checkbox acknowledging the submission have been validated and reviewed for accuracy and authenticity and that all warnings and special warnings have been reviewed and confirmed.
- Click the **Confirm** button and the data is now ready for the ESC to verify and accept or reject.
- If rejected the district must correct the data and go through the whole process again.

TSDS – Superintendent Approval Form (SAF) Process

The Superintendent must approve all PEIMS submissions. This is accomplished through the Superintendent Approval Form (SAF) process. The Superintendent may also request an extension for one of the PEIMS submissions. All extensions must be approved by TEA. The district must have extenuating circumstances to receive an extension.