Contents

This document will serve as a guide for the requirements in the submission of your district's financial and staff data for the National Study for Special Education Spending (NSSES). As you progress through this process, please reach out to the PowerSchool Research team for any questions that may arise. We are here to help. You can reach us at dataresarch@powerschool.odoo.com or through the PowerSchool Odoo portal.

NOTE: Please ensure that the https://powerschool.odoo.com domain is whitelisted as all communications regarding your data submission will come from here.

Data Scope

The scope for this portion of the study will require the following four (4) data files from your LEA:

- Detailed Account Segments/Dimensions
- Account Balances
- Transaction Details
- Staffing

In Scope:

1) Detailed Account Segments/Dimensions file –
    a. All segment codes and segment types for general and special education accounts.
2) Account Balances and Transaction Details files –
    a. All expenditures for general and special education accounts.
3) Staffing file –
    a. All employees who hold any job within the LEA (general and special education) and their salaries.
        i. Salaries are defined as all payments employees receive for their assigned position(s).
        ii. Employees are defined as individuals who held positions within the LEA during the 2024 fiscal year.
        iii. Jobs are defined as the job title/description for roles and duties that someone conducts while holding their position(s). For example, a job may be "Grade 1 Teacher" or "Data Systems Administrator".
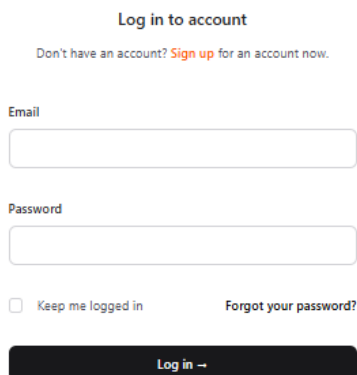
Not In Scope:

1) Account Balances and Transaction Details files:
    a. Revenues - do not include balances or transactions from revenue accounts.
    b. Budgeted expenditures - do not include transaction- or balance-level amounts that were budgeted to be spent out of each account in FY 2024.
    c. Encumbered amounts - do not include transaction- or balance-level encumbered amounts for any account maintained in FY 2024.
    d. Capital outlay expenditures - do not include balances or transactions from capital projects or capital asset accounts.
    e. Debt service expenditures - do not include balances or transactions from debt service accounts.
2) Staffing file:
    a. Do not include benefits, per diem, and supplemental pay for salaries.

File and Data Submission

1) File Format: Save file with **CSV UTF-8 (Comma delimited) (*.csv)** option.
   a. Other options – ASCII or Latin-1
   b. Your system may offer different .csv options – select the correct one.
   c. Will receive file submission error if file saved with different option.
2) Leading Zeroes: **Ensure leading zeroes are displayed**. Options to show leading zeroes:
   a. Change field/column to "Text" using Format Cells option
   b. File>Options>Data>Automatic Data Conversion – uncheck "Remove leading zeros and convert to a number option".
   c. Put a single quote mark before the 0's in the cell.
3) Blank field values: **Ensure there are no blank cells in columns that a value is mandatory.** The most common issue is a cell that contains only 0's. See 2) above to resolve this type of issue.
4) Hidden characters:
   a. If possible, all files should be pipe-delimited
   b. If possible, all files should have special characters properly quoted or escaped to ensure readability of files.

File Submission Process

1) The location for loading your files is here - NSSES Data Loader
2) Register your name and email address. If there are any issues, please update case that you are having a problem.

Log in to account

Don't have an account? Sign up for an account now.

Email

Password

☐ Keep me logged in   Forgot your password?

Log in →

3) Upload each file individually.

Submit Your District
Financial Data to NSSES

4) You will receive notification that the files have been received.
5) You will receive notification(s) for any issues that are identified with the files. You will be required to resubmit the files to resolve any issues.
6) Files will be successfully submitted and complete when no issues exist.

Data Files/Templates

There are 2 options for you to use when pulling your data:
1) Manual – this requires you to access the data from your ERP system and manually update the NSSES templates with the required information.
   a. Excel templates are available for the 4 different files.
2) SQL queries are available for identified ERP systems to help support the data pull. See list below of available ERP product queries.

AS400	PS eFinancPlus (self-hosted)
Infor Lawson	Sage Intacct
LINQ	Skyward Classic (SMS)
Oracle E-Business Suite (R12)	Skyward Qmlativ
Oracle Fusion Cloud	Tyler Technologies Enterprise ERP/MUNIS
PeopleSoft	Tyler Technologies School EPR Pro (formerly Infinite Visions)
PowerSchool BusinessPlus	

   a. For the SQL scripts - adjust (if needed) the queries for your LEA's COA and ERP configurations. Comments have been added throughout the scripts to draw attention to pieces of code that will need to be updated.
   b. The data must be submitted in the format of the NSSES file layouts and headings identified below.
   c. Optionally, you may also include additional fields, beyond the required ones, if it would help the research team in understanding your LEA's financial data.
3) Template access –
   a. Files for the Excel templates or SQL queries are available here:
   https://us.workplace.datto.com/webhome?XJMDO_6c=1OBU-VEZ8-XZ16-XN5T-SYKY#/folder/ViewFolder.action?folderId=1585979678

NOTE: Are you an existing PowerSchool ERP or Allovue Manage client? – you may opt in to have PowerSchool pull your data for you. If you are interested, update you ticket requesting this service. Additional data access and approval information will be provided.

Data Requirements

Detailed Account Segments/Dimensions

Detailed account segments/dimensions from the chart of accounts (COA). This file should help us understand your LEA's account structure and what each of the segment codes used in your account codes represents:

1) A list of all the segments (both special education-related and non-special education-related) and their descriptions that make up your LEAs' account codes.
2) Each row is a unique segment code that your LEA uses in its active accounts, listed next to the type of segment it is, the name of the segment, etc.
3) Revenues (i.e., do not include balances or transactions from revenue accounts)
4) Budgeted expenditures (i.e., do not include transaction- or balance-level amounts that were budgeted to be spent out of each account in FY 2024. Only include actual expenditures)
5) Encumbered amounts (i.e., do not include transaction- or balance-level encumbered amounts for any account maintained in FY 2024. Only include actual expenditures)
6) Capital outlay expenditures (i.e., do not include balances or transactions from capital projects or capital asset accounts)
7) Debt service expenditures (i.e., do not include balances or transactions from debt service accounts)

File Layout

segment_code	segment_type	segment_type_order	segment_code_length	segment_name	crosswalk_code
10	Fund	1	2	General Fund	
0	Subfund	2	1	State Resources	
1	Subfund	2	1	Local Resources	
2102	Object	3	4	Salaries	
2551	Object	3	4	Sick Leave	
02	Function	4	2	Operations	
20	Function	4	2	Professional Development	
60	Function	4	2	Food	
00	Program	5	2	Undefined	
02	Program	5	2	Instruction-General	
34	Program	5	2	Vocational Education	
12708	Resource	6	5	Operation Exploration	
15400	Resource	6	5	Early Learning Program	
16400	Resource	6	5	Transportation Supervision	
01	Location	7	2	District wide	
21	Location	7	2	Elementary School	
73	Location	7	2	Middle School	

Data Requirements

FIELD	FIELD NAME	FIELD DESCRIPTION
Segment code (required)	segment_code	1) List each unique segment/element/dimension code that your LEA used in 2024. 2) Duplicate values are allowed in this column. 3) The codes should align with your State DOE chart of accounts definitions and titles.
Segment type (required)	segment_type	1) Indicate the segment type for each segment code. 2) Duplicates values are allowed in this column. 3) The values should align with your State DOE chart of accounts definitions and titles. (May not be an exact match depending on your ERP system.)
Segment type order (required)	segment_type_order	1) The numerical position in which the segment type falls in the account code. (i.e., 10-0-2334-02-34-50660-97: "34" is in position "5") 2) Duplicate values are allowed in this column.
Segment code length (required)	segment_code_length	1) Indicate the length for each segment/element/dimension code. 2) Duplicates values are allowed in this column. 3) The values should align with your State DOE chart of accounts definitions and titles. (May not be an exact match depending on your ERP system.)
Segment name (required)	segment_name	1) Indicate the Description/Title for the segment code. 2) The values should align with your State DOE chart of accounts definitions and titles. (May not be an exact match depending on your ERP system.)
Crosswalk code (not applicable to all LEAs) (optional)	crosswalk_code	1) To be used if you do not follow the segment/element/dimensions codes defined by your State DOE. 2) Enter the appropriate State DOE segment/element/dimensions code.

Account Balances

Account balances from the general ledger (GL) (or expenditure ledger, depending on your ERP):
1) A list of all your LEA's active accounts (both special education and non-special education)
2) The amount spent out of them in the 2024 fiscal year.
3) Each row in this file represents one unique account maintained in FY 2024, listed with its balance.

File Layout

account_code	fund	subfund	object	function	program	resource	location	fiscal_year	actual
10-0-2102-02-02-50200-01	10	0	2102	02	02	50200	01	2024	59548.8
10-0-2334-02-34-50660-97	10	0	2334	02	34	50660	97	2024	233.73
10-0-6400-60-00-16400-99	10	0	6400	60	00	16400	99	2024	38724.57
10-0-6400-60-00-16402-99	10	0	6400	60	00	16402	99	2024	0
10-0-9000-90-00-99170-21	10	0	9000	90	00	999170	21	2024	973.27
10-1-2551-02-51-58780-01	10	1	2551	02	51	58780	01	2024	169.38
10-1-2554-02-54-58780-01	10	1	2554	02	54	58780	01	2024	1347.15
10-1-2700-20-00-12708-73	10	1	2700	20	00	12708	73	2024	641.76
10-1-3400-20-00-15400-88	10	4	3400	20	00	15400	88	2024	735.12

Data Requirements

FIELD	FIELD NAME	FIELD DESCRIPTION
Account code (required)	account_code	1) Enter fully qualified account code for each item. 2) There should be one unique value for each active account in FY 2024.
Segment codes (optional)	Column names should match the Segment Types identified in the Detailed Account Segments/Dimensions file	1) List each unique segment/element/dimension code that your LEA used in 2024. 2) Duplicate values are allowed in this column. 3) The codes should align with your State DOE chart of accounts definitions and titles.
Fiscal year (required)	fiscal_year	1) The default value = "2024" for all records.
Actual expenditure amount (required)	actual	1) Total expenditure spent out of the account in FY 2024.

Transaction Details

Transaction details from the transaction journal (TJ):
1) An itemized list of all the transactions associated (both special education-related and non-special education- related) with each active account your LEA maintained in the 2024 fiscal year.
2) Each row is a unique transaction that was charged to an account in FY 2024.
3) The sum of an account's transactions should equal the account's balance in the *Account Balances* file.

File Layout

account_code	fund	subfund	object	function	program	resource	location	fiscal_year	date	description	amount
10-0-2334-02-34-50660-97	10	0	2334	02	34	50660	97	2024	3/31/24	05/30/20010090P#24084FELIO	2347.1
10-0-2334-02-34-50660-97	10	0	2334	02	34	50660	97	2024	6/7/24	HomeDepot.com	13.78
10-0-6400-60-00-16400-99	10	0	6400	60	00	16400	99	2024	10/13/23	11009 Prof Develo	887.99
10-0-6400-60-00-16400-99	10	0	6400	60	00	16400	99	2024	5/15/24	CityPub Utilities	1023.94
10-0-9000-90-00-99170-21	10	0	9000	90	00	99170	21	2024	5/9/24	Lumber Bubao Park	850.02
10-0-9000-90-00-99170-21	10	0	9000	90	00	99170	21	2024	10/10/23	Amin Harps IFSUU0VQ2	122.75
10-1-2561-02-51-58780-01	10	1	2561	02	51	58780	01	2024	11/21/24	16002 Prof. Day	12.45
10-1-2700-20-00-12708-73	10	1	2700	20	00	12708	73	2024	12/8/23	PC AM/N	17.99
10-1-3400-20-00-15400-88	10	1	3400	20	00	15400	88	2024	8/28/23	Pro Day	103

Data Requirements

FIELD	FIELD NAME	FIELD DESCRIPTION
Account code (required)	account_code	1) Enter fully qualified account code for each item. 2) Duplicate account codes will occur.
Segment codes (optional)	Column names should match the Segment Types identified in the Detailed Account Segments/Dimensions file	1) List each unique segment/element/dimension code that your LEA used in 2024. 2) Duplicate values are allowed in this column. 3) The codes should align with your State DOE chart of accounts definitions and titles.
Fiscal year (required)	fiscal_year	1) The default value = "2024" for all records.
Date (required)	date	1) Indicate date expense occurred. 2) Format is MM/DD/YY.
Description (required)	description	1) Enter description of the item/service purchased or reason for the transaction.
Transaction amount (required)	amount	1) Enter the amount for the transaction

Staffing

Staffing data from human resource information system (HRIS) and/or position control system:
1) A list of all LEA employees (both special education-related and non-special education- related) who held positions within the LEA during FY 2024 and their paid salaries.
2) Employee names should not be listed; instead, use employee code to identify each unique employee.
3) Employees who occupy multiple positions should appear in multiple rows, once for each assigned position.
4) Salaries should exclude benefits, per diem, and supplemental pay.

File Layout

employee_code	fte	position_code	job_code	job_name	job_class_code	job_class_name	location_code	location_name	pay_type	pay_basis	amount
86	1.0	4158	4627	Accountability Analyst	A000	Analyst	106	ABC Middle School	Regular	Daily	300
79	1.0	0939	9328	Autism Therapist	A001	Autism Therapist	019	AB Elementary School	Regular	Daily	386.54
57	1.0	0978	6620	IT Officer	A002	Officer	057	Administration Bldg	Regular	Daily	623.05
04	1.0	1018	607	Data Coordinator	B005	Coordinator	109	Administration Bldg	Regular	Daily	365.47
63	0.5	1017	2678	Classroom Aide	D010	Educational Assistant	924	CD Elementary School	Regular	Hourly	21.73
57	1.0	1024	7124	College Counselor	E100	Counselor	146	EF High School	Regular	Daily	337.64
70	1.0	0901	9988	Special Education Assistant	D200	Special Education Assistant	005	JK Middle School	Regular	Daily	179.39
75	1.0	9030	970	Teacher-3rd Grade	C001	Elementary Teacher	841	LM Elementary School	Regular	Daily	388.2

Data Requirements

FIELD	FIELD NAME	FIELD DESCRIPTION
Employee Code (required)	employee_code	1) Enter a unique identifier for each employee. 2) Duplicate employee codes may occur if a single employee holds more than 1 position in the district.
FTE (required)	fte	1) Enter the Full Time Equivalency (FTE) - up to 1.0 - for each employee for a specific position they are assigned. 2) Duplicate values are allowed in this column.
Position Code (required)	position_code	1) Enter a unique identifier for a position (i.e., position control number or position number) 2) Duplicate values are allowed in this column.

FIELD	FIELD NAME	FIELD DESCRIPTION
Job Code (required)	job_code	1) Enter a unique identifier for a job code. 2) Duplicate values are allowed in this column.
Job Name (required)	job_name	1) The name of the Job/Job Title 2) Duplicate values are allowed in this column.
Job Class Code (required)	job_class_code	1) Enter a unique identifier for the job class code. 2) Duplicate values are allowed in this column.
Job Class Name (required)	job_class_name	1) Enter a unique descriptor for the job class name. 2) Duplicate values are allowed in this column.
Location Code (required)	location_code	1) Enter unique identifier for the work location code. 2) Duplicate values are allowed in this column.
Location Name (required)	location_name	1) Enter the work location name. 2) Duplicate values are allowed in this column.
Pay Type (required)	pay_type	1) A description of the type of pay (i.e., Regular, Overtime, Extra Duty, Stipend, etc.) 2) Duplicate values are allowed in this column.
Pay Basis (required)	pay_basis	1) Enter the descriptor for the frequency of how the pay is calculated (i.e., Monthly, Daily, Annual, Hourly, etc.) 2) Duplicate values are allowed in this column.
Amount (required)	amount	1) Enter the pay amount based on the Pay Basis descriptor i.e., a person receives $12,000 per year and is paid monthly – the amount would be $1000. 2) Duplicate values are allowed in this column.