Business & Finance Division Systems Report

Reporting Period: November 2025

Division Overview

The Business & Finance Division of Mansfield ISD is committed to maintaining fiscal integrity, transparency, and operational excellence in support of the district's mission to inspire and educate all students to achieve their full potential. This division provides leadership and oversight for all financial operations, ensuring compliance with local, state, and federal regulations. The departments under the Business & Finance umbrella include Accounting & Finance, Budget, Payroll & Benefits, PEIMS, and Purchasing & Warehouse.

❖ Accounting & Finance Department

Purpose: To ensure accurate financial reporting, safeguard district assets, maintain compliance with governmental accounting standards and TEA financial accountability requirements.

Primary Systems Used:

- Skyward Finance – General Ledger, Cash Receipts, Accounts Payable, Accounts Receivable, and Bank Reconciliation
- Microsoft Excel, Word, and SharePoint
- Box, Incident IQ, Eduphoria

Key Functions:

- General ledger management and reconciliation at district and campus levels
- Monthly and annual financial reporting and audit coordination
- Cash flow management and investment strategy and tracking
- Fixed asset recordkeeping

Current Highlights:

- Just concluded another successful audit of the district's financial statements.
- Superior rating on FIRST report
- TASBO Excellence in Financial Management
- ASBO and GFOA Certificate of Excellence in Financial Reporting

❖ Budget Department & Accounts Payable

Purpose: To develop, manage, and monitor the district's annual budget while aligning resources with instructional priorities and strategic goals.

Primary Systems Used:

- Skyward Finance
- Microsoft Excel

Key Functions:

- Preparation and adoption of the annual budget
- Budget amendments
- Revenue and expenditure monitoring
- Collaboration with campuses and departments on budget planning
- Processing vendor payments and district reimbursements

Current Highlights:

- Identifying potential areas to reduce costs over the next few years.
- ASBO Meritorious Budget Award

❖ Payroll & Benefits Department

Purpose: To provide accurate and timely payroll and benefits administration for all district employees while ensuring compliance with TRS, IRS, and ACA requirements.

Primary Systems Used:

- Skyward Payroll Module
- The Benefits Hub
- TRS Reporting Portal

Key Functions:

- Payroll processing and reporting
- Employee benefits enrollment and reconciliation
- TRS, tax, and ACA reporting
- Leave balance and time management

Current Highlights:

- Updating payroll system to account for qualified overtime premiums due to the requirement in the One Big Beautiful Bill Act.
- Communicating with employees to make sure they understand the deductions they are to make when filing their taxes (not changes to their paycheck withholding).

❖ PEIMS/SIS Department

Purpose: To manage accurate and compliant student and staff data reporting to the Texas Education Agency (TEA), ensuring Mansfield ISD receives appropriate funding and meets all state and federal accountability, compliance, and reporting requirements. The department also oversees the district's Student Information System (SIS), Skyward Student, including system configuration, security, user access, and support for campus and departmental users.

Primary Systems Used:

- **ClassLink** – Single sign-on and roster management linked to Skyward for secure user access and provisioning.
- **District Reporting Tools** – Used for data validation, reconciliation, and internal audit reviews.
- **OnDataSuite** – Data analytics and reporting tool used to audit, validate, and analyze PEIMS, assessment, and accountability data.
- **Skyward Student & Business Databases** – Student enrollment, attendance, grades, discipline, and staff employment data management.
- **TEA / TEAL Applications** – Systems for state reporting and user management.
  - **AskTED -** District directory maintenance
  - **Texas Student Data System (TSDS)** – State data submission, validation, and reporting platform for PEIMS and other collections.
  - **Texas Records Exchange (TREx)** – Secure platform for transferring student records between Texas public schools and for official transcript exchange.

Key Functions:

- Coordinate districtwide collection, validation, and submission of student and staff data for all PEIMS submissions (Fall, Midyear, Summer, Extended Year, Core Collections, Civil Rights Data Collection).
- Maintain compliance with TEA data standards, student attendance accounting rules, and staff reporting requirements.
- Administer and support the district's Skyward Student database, including system updates, user management (*staff, family, student*), maintenance, and process improvements.
- Oversee all system integrations with Skyward Student, ensuring accurate and secure data exchange between the SIS and third-party systems (e.g., ClassLink, Eduphoria, ParentSquare, SameGoal, etc.).
- Collaborate with district departments (Assessment & Accountability, CCMR, HR, Special Services, Student Services, Transportation, etc.) to ensure accurate and consistent data entry.
- Provide training and guidance to campus and department staff on data quality, reporting timelines, and accountability impacts.
- Support district leadership with data-driven insights to ensure compliance, funding accuracy, and accountability performance.

Current Highlights:

- **Successful Ed-Fi PEIMS Implementation:** Completed all 2024–25 PEIMS submissions under the new TEA Ed-Fi data standard, ensuring Mansfield ISD met new state reporting

requirements on time and with high data accuracy — despite statewide TEA and Skyward system challenges during implementation.

- **Districtwide PEIMS Staff Collaboration:** Coordinated and trained campus-based PEIMS staff on updated data entry processes, submission procedures, and compliance changes associated with the new Ed-Fi model.
- **ParentSquare Implementation Support:** Partnered with Technology and Communications departments to support the successful rollout of ParentSquare, ensuring accurate data integration from Skyward for districtwide parent and student communication.
- **System Process Optimization:** Continued improvement of Skyward workflows and data verification tools to enhance efficiency, consistency, and data quality across campuses.

❖ **Purchasing & Warehouse Department**

Purpose: To facilitate the procurement, distribution, and management of district resources in accordance with Board policy and state procurement laws.

Primary Systems Used:

- Skyward Finance – Purchasing Module
- IonWave (EunaProcurement)
- EqualLevel (EunaMarketplace)
- Skyward Inventory
- TIPWEB

Key Functions:

- Vendor bids and contract management
- Purchase order creation, approval, and tracking
- Inventory control and distribution services
- Student Record Management
- Management of surplus property and fixed assets

Current Highlights:

- Continued receipt of TASBO Award of Merit recognition for excellence in Purchasing operations.
- Currently transitioning from Citibank to U.S. Bank as part of a statewide contract change. This is a large operation affecting every campus and department during a normally very busy time of year.
- Implemented a new combined Awarded Vendor List, providing extensive information regarding district vendors in one searchable document, instead of being spread across multiple ones.
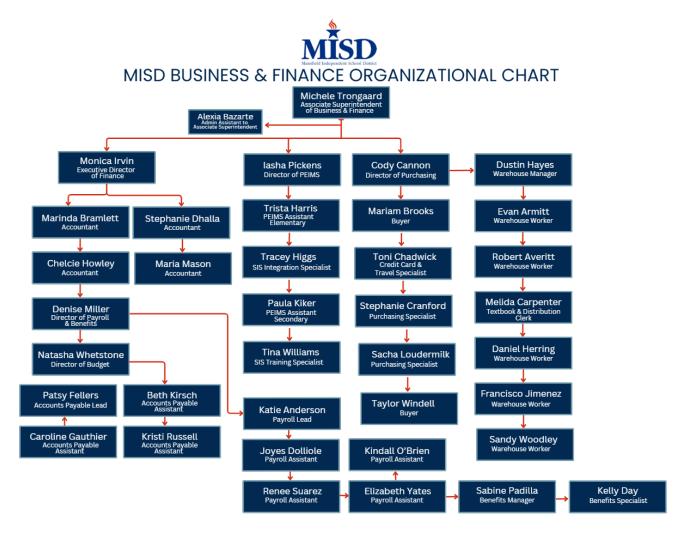- Reorganized IIQ tickets to reduce confusion and keep tasks organized.

Department Scorecard 2030

Business Services
2021-2026

1.	Business Services								
#	Key Strategic Measure	5 Year Goal	Base Line 21-22	Actual Data					Status
				22-23	23-24	24-25	25-26	26-27	
1.1	Highest rating on FIRST	Superior	Superior	Superior	Superior	Superior			
1.2	Clean financial audit	Unqualified Opinion	Unqualified Opinion	Unqualified Opinion	Unqualified Opinion	Unqualified Opinion			
1.3	Provide Training for District Staff	15 per year	8 per year	19 Trainings	22 Trainings	21 Trainings			

2.	PEIMS								
#	Key Strategic Measure	5 Year Goal	Base Line 21-22	Actual Data					Status
				22-23	23-24	24-25	25-26	26-27	
2.1	The PEIMS department will provide 5 trainings/meetings a year for PEIMS/registrar staff.	100%	100%	100%	100%	100%			
2.2	The PEIMS department will visit the campus of all new PEIMS, registrar and attendance clerks 3 times during their 1st year to review/audit for understanding/accuracy.	100%	70%	100%	100%	100%			
2.3	The PEIMS department will conduct yearly audits of 15 campus leaver, attendance, and discipline records.	100%	100%	100%	100%	100%			

3.	Purchasing								
#	Key Strategic Measure	5 Year Goal	Base Line 21-22	Actual Data					Status
				22-23	23-24	24-25	25-26	26-27	
3.1	Purchasing will host 4 trainings to educate school district personnel on policies and procedures related to the acquisition of goods and services	100%	4	4	2	4			
3.2	Rebates from Vendors	$125,000.00	$180,285.00	$103,128.00	$151,377.00	$244,509.00			
3.3	Award of Merit received from TASBO	Awarded	Awarded	Awarded	Awarded	Applied			

4.	Accounting								
#	Key Strategic Measure	5 Year Goal	Base Line 21-22	Actual Data					Status
				22-23	23-24	24-25	25-26	26-27	
4.1	Conduct 5 trainings to educate school personnel on topics related to budget and accounting	5	7	7	7	7			
4.2	Zero audit findings on year-end audit report	0	0	No Findings	No Findings	No Findings			
4.3	Reduce # CAFR comments when reviewed by ASBO & GFOA	5	2 ASBO 6 GFOA	3 ASBO 5 GFOA	4 ASBO 8 GFOA	Due In January			
4.4	Comparison of PEIMS data to like information in the CAFR resulting in a total variance of less than 3% of all expenditures by function	<1%	< 1%	<1%	<1%	Due In February			

5.	Budget								
#	Key Strategic Measure	5 Year Goal	Base Line 21-22	Actual Data					Status
				22-23	23-24	24-25	25-26	26-27	
5.1	Budget will host 4 trainings on various budget topics to MISD personnel	100%	100%	100%	100%	100%			
5.2	Meritorious Budget Award received from ASBO	Awarded	Awarded	Awarded	Awarded	Awarded			

6.	Payroll								
#	Key Strategic Measure	5 Year Goal	Base Line 21-22	Actual Data					Status
				22-23	23-24	24-25	25-26	26-27	
6.1	Complete Payroll Manual posted on website	100%	100%	100%	100%	100%			
6.2	% of timely payments and reports to TRS, TWC and IRS	100%	100%	100%	100%	100%			

7.	Accounts Payable								
#	Key Strategic Measure	5 Year Goal	Base Line 21-22	Actual Data					Status
				22-23	23-24	24-25	25-26	26-27	
7.1	Accounts Payable will hold 2 meetings per year with MISD secretaries to educate them on annual close-out procedures/processes	100%	100%	100%	100%	100%			

Met or Exceeded 5 Year Goal	On Track Towards Meeting Goal with a Positive Trend	Did Not Achieve Yearly Goal- Improvement Effort Suggested	Current Progress Did Not Achieve Goal- Improvement Effort Required

Organizational Chart

MISD BUSINESS & FINANCE ORGANIZATIONAL CHART

Michele Trongaard — Associate Superintendent of Business & Finance

Alexia Bazarte — Admin Assistant to Associate Superintendent

Monica Irvin — Executive Director of Finance
- **Marinda Bramlett** — Accountant
  - **Chelcie Howley** — Accountant
    - **Denise Miller** — Director of Payroll & Benefits
      - **Natasha Whetstone** — Director of Budget
        - **Patsy Fellers** — Accounts Payable Lead
          - **Caroline Gauthier** — Accounts Payable Assistant
        - **Beth Kirsch** — Accounts Payable Assistant
          - **Kristi Russell** — Accounts Payable Assistant
- **Stephanie Dhalla** — Accountant
  - **Maria Mason** — Accountant

Iasha Pickens — Director of PEIMS
- **Trista Harris** — PEIMS Assistant Elementary
- **Tracey Higgs** — SIS Integration Specialist
- **Paula Kiker** — PEIMS Assistant Secondary
- **Tina Williams** — SIS Training Specialist
- **Katie Anderson** — Payroll Lead
  - **Joyes Dolliole** — Payroll Assistant
    - **Renee Suarez** — Payroll Assistant

Cody Cannon — Director of Purchasing
- **Mariam Brooks** — Buyer
- **Toni Chadwick** — Credit Card & Travel Specialist
- **Stephanie Cranford** — Purchasing Specialist
- **Sacha Loudermilk** — Purchasing Specialist
- **Taylor Windell** — Buyer
- **Kindall O'Brien** — Payroll Assistant
  - **Elizabeth Yates** — Payroll Assistant
    - **Sabine Padilla** — Benefits Manager
      - **Kelly Day** — Benefits Specialist

Dustin Hayes — Warehouse Manager
- **Evan Armitt** — Warehouse Worker
- **Robert Averitt** — Warehouse Worker
- **Melida Carpenter** — Textbook & Distribution Clerk
- **Daniel Herring** — Warehouse Worker
- **Francisco Jimenez** — Warehouse Worker
- **Sandy Woodley** — Warehouse Worker

Division-Wide Initiatives

- Systems Integration: Aligning Skyward Finance, HR, and Student modules for seamless data flow.
- Process Automation: Expanding electronic workflows for approvals, payroll, and purchasing.
- Professional Development: Providing financial training for campus and department staff.
- Transparency & Reporting: Enhancing financial dashboards and accountability reporting.

Summary

The Mansfield ISD Business & Finance Division continues to enhance its systems and operations to ensure fiscal responsibility, transparency, and efficiency. Through innovation, staff development, and collaborative efforts, the division supports the district's mission of academic excellence and responsible resource management.