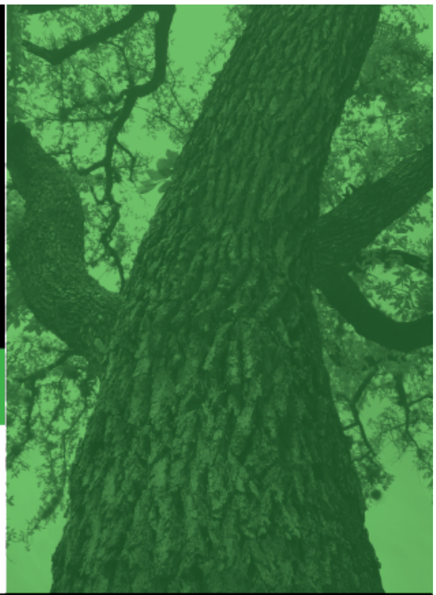
ASCENDER GUIDES



ASCENDER - New Employee Setup

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ASCENDER - New Employee Setup

Created: 06/28/2018
Reviewed: in progress
Revised: in progress

The purpose of this document is to guide you through the process of setting up a new hire in ASCENDER. The tasks to create a new employee record are done in both Payroll and Personnel.

This document assumes you are familiar with the basic features of the ASCENDER Business system and have reviewed the ASCENDER Business Overview guide.

Some of the images and/or examples provided in this document are for informational purposes only and may not completely represent your LEA's process.

Before You Begin

Review the following information and/or complete the listed steps before creating a new employee record.

Review terms:

The following terms are used throughout this document.

Term	Description
Payroll frequency	The amount of time between an employee's paydays. There are three pay frequency options: **4 biweekly** - employee receives pay every two weeks **5 semimonthly** - employee receives pay twice a month **6 monthly** - employee receives pay once a month Each pay frequency exists in the current and next year payroll periods. You must log on to a pay frequency to view the associated payroll records.

Term	Description
Pay Types	**pay type 1** - contracted employee **pay type 2** - non-contracted employee **pay type 3** - hourly employee **pay type 4** - substitute

Although all of the fields on the Demographic and Staff Job/Pay Data tabs are not required to create a new employee record, some of the fields are required and used for reporting to the following agencies.

Agency	Reporting Type
Texas Education Agency (TEA)	PEIMS data reporting
Teacher Retirement System (TRS)	TRS reporting
Internal Revenue Service (IRS)	Tax reporting
Social Security Administration (SSA)	Social Security retirement, survivors, and disability insurance reporting
Texas Workforce Commission (TWC)	Unemployment reporting

❏ Log on to the TRS Reporting Entity Portal to verify the employee's TRS status.

- Verify if the new member contribution is due.
- Verify if the employee is a TRS retiree. If so, verify the retiree's retirement date to determine if any surcharges are due. Use this information to correctly identify the employee as a retiree on the Payroll > Maintenance > Staff Job/Pay Data > Pay Info tab and charge the Retiree Care Surcharge, if applicable.

❏ Obtain the employee's contract or employee agreement to reference important details needed to create the employee's record.

❏ If the employee was previously employed by another LEA and you are waiting for the service record originals via mail, you may want to try to obtain a service record copy via fax in order to continue with the process.

❏ Follow your LEA procedures to obtain employee Unique ID numbers through TEA’s Texas Student Data System (TSDS).

Review the PEIMS Reporting Elements.

Review the required TRS Reporting Data Fields. (prints separately)

Review the FICA/Medicare - Quick Reference. (prints separately)

New Employee Document Checklist

New Employee Document Checklist

Review the following information to identify the needed documents before and upon hiring a new employee.

This checklist serves only as a reference since document requirements can vary based on the LEA. **It is important** to verify the documentation requirements specific to your LEA.

Before employment:

Employment Type	Document Type (R - Required/C - Confidential)
All	❑ Application ❑ References ❑ Criminal history check (R, C)
Professional employees	❑ Credentials (valid Texas certificate, permit, or license) (R) ❑ Service record and any required attachments (R) ❑ Official college transcripts
Educational aides	❑ Certification ❑ Official college transcript or NCLB assessment of skills (R)
Bus Drivers (includes all employees required to have a CDL)	❑ Proof that applicant is at least 18 years of age (R) ❑ Preemployment drug-screening test (R, C) ❑ Post-offer employment physical (R, C) ❑ Proof of valid driver's license and proof of safe driving record (R) ❑ Valid driver training certificate (R) ❑ Previous employers' alcohol- and drug-screening test information (R, C)
Police Officers	❑ Previous employment information from Texas Commission on Law Enforcement (R)

Upon employment:

Employment Type	Document Type (Required (R)/Confidential (C))
All	❑ District-completed Form I-9 (R) ❑ Statement concerning employment in a job not covered by Social Security (R) ❑ W-4 Form (R) ❑ Benefit enrollment forms ❑ Verification of official Social Security number (C) ❑ Authorization for Release/Closure of Personal Information (R) ❑ Notice of reasonable assurance (noncontract employees only) ❑ Notice of Rights and Responsibilities Under the Family and Medical Leave Act (R) ❑ Notice of requirements under the Affordable Health Care Act (R) ❑ New-hire report for submission to the state (R) ❑ Copy of district drug-free workplace policy
Professional	❑ Employee-signed receipt for contract and copy of employment policies ❑ Teaching schedule or other assignment record ❑ Teacher-signed receipt for a copy of TEC Chapter 37, Subchapter A, regarding student discipline and related local board policy
Coaches, Sponsors, and Head Band Directors	❑ Professional Acknowledgment Form (R)
Police Officers	❑ Appointment of Licensee (Texas Commission on Law Enforcement (TCOLE) Form L-1) (R)

Create an ASCENDER Employee Record

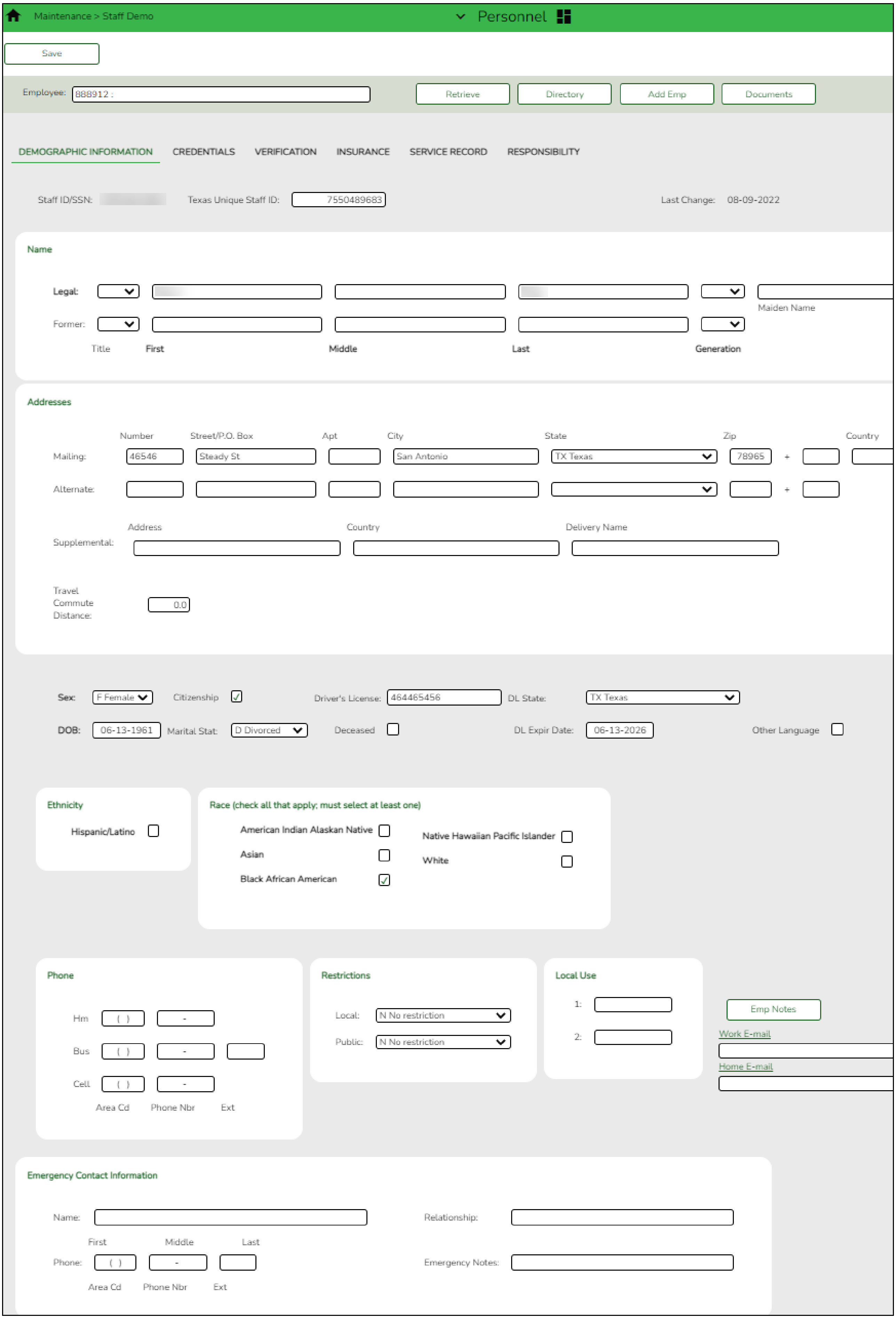
1. Create the employee demographic record.

   Personnel > Maintenance > Staff Demo > Demographic Information

   This tab is used to enter employee demographic data including name, address, phone number, and emergency information. The data on this tab is used throughout the system.

   Notes:

   - Warning: If the **School Year for PEIMS Codes** field does not contain a valid value on the Personnel or Payroll > Tables > District HR Options page, values are not displayed in the **PEIMS** drop-down fields (e.g., **Sex**, **Ethnicity**, etc.).
   - ED20 (Demo) and ED25 (Demo Adj) records are automatically created when any demographic information changes are made on this tab. ED25 records are not created for changes made to a terminated employee's demographic record.
   - If an ED20 record has been submitted and corrections are required, submit an ED25 record the following month. Do not send both an ED20 and an ED25 record for the same employee in the same month.


Maintenance > Staff Demo
Personnel
Save
Employee: 888912 :
Retrieve
Directory
Add Emp
Documents
DEMOGRAPHIC INFORMATION
CREDENTIALS
VERIFICATION
INSURANCE
SERVICE RECORD
RESPONSIBILITY
Staff ID/SSN:
Texas Unique Staff ID: 7550489683
Last Change: 08-09-2022
Name
Legal:
Former:
Maiden Name
Title
First
Middle
Last
Generation
Addresses
Number
Street/P.O. Box
Apt
City
State
Zip
Country
Mailing: 46546 Steady St San Antonio TX Texas 78965 +
Alternate: +
Address
Country
Delivery Name
Supplemental:
Travel Commute Distance: 0.0
Sex: F Female
Citizenship
Driver's License: 464465456
DL State: TX Texas
DOB: 06-13-1961
Marital Stat: D Divorced
Deceased
DL Expir Date: 06-13-2026
Other Language
Ethnicity
Hispanic/Latino
Race (check all that apply; must select at least one)
American Indian Alaskan Native
Asian
Black African American
Native Hawaiian Pacific Islander
White
Phone
Hm ( ) -
Bus ( ) -
Cell ( ) -
Area Cd
Phone Nbr
Ext
Restrictions
Local: N No restriction
Public: N No restriction
Local Use
1:
2:
Emp Notes
Work E-mail
Home E-mail
Emergency Contact Information
Name:
Relationship:
First
Middle
Last
Phone: ( ) -
Emergency Notes:
Area Cd
Phone Nbr
Ext

The following fields are required to save a new employee record:

- **First** and **Last Name**
- **Staff ID/SSN**
- **Sex**
- **DOB**
- **Ethnicity**
- **Race**

❑ Complete the necessary fields. If you do not have all of the necessary information at this time, be sure to complete this page at a later time.

❑ Click **Add Emp** to add a new employee record. A blank record is displayed allowing you to begin entering data.

- If the **Auto Assign Employee Number** field is selected on the Payroll or Personnel > Tables > District HR Options page, the employee is assigned the next available employee number upon saving the record.
- If the **Auto Assign Employee Number** field is not selected, in the **Employee** field, type an employee number and click **Retrieve**. If the employee number is available, the following message is displayed:

  Click **Yes** to continue and create the record. Otherwise, click **No**.

Add demographic information.

Field	Description
Staff ID/SSN (Social Security Number)	This field is only enabled when adding a new employee record. Type the employee's nine-digit Staff ID/Social Security Number, which uniquely identifies the employee. If the **Staff ID/SSN** requires a change, the change must completed using the **TStaff ID** section on the Personnel > Utilities > Change Staff ID/TX Unique ID page. Reported to SSA, IRS, and TRS.

Field	Description
Texas Unique Staff ID	Type the 10-digit Texas Unique Staff ID issued by the Texas Education Agency (TEA). Once a value is entered and saved in this field, the field becomes display only and you can no longer make edits to the field. If the **Texas Unique Staff ID** requires a change, the change must be completed using the **TX Unique ID** section on the Personnel > Utilities > Change Staff ID/TX Unique ID page. If the employee does not have a Texas Unique Staff ID, click TSDS Unique ID to connect to the TSDS Unique ID Web Service and obtain an ID. Your LEA **must** have the appropriate credentials through Texas Education Agency Login (TEAL) before this functionality can be used. In addition, you can also use the Personnel > Utilities > Texas Unique Staff ID Interface > Staff ID Export and Import pages. Review the Assign a TSDS Unique ID guide for additional information.
Extract for UID Resub	Select to resubmit employee information to TEA after a **Texas Unique Staff ID** has already been entered in ASCENDER. This option allows the LEA to inform TEA that an individual is officially employed at a specific LEA ensuring data accuracy for TSDS reporting. This checkbox is disabled if there is no value in the **Texas Unique Staff ID** field. If selected, the information will be included in the Personnel > Utilities > Texas Unique Staff ID Interface > Extract. After the extract is processed, the **Extract for UID Resub** checkbox remains selected and the following message is displayed next to the checkbox: **Submitted to TEA**. After the Personnel > Utilities > Texas Unique Staff ID Interface > Import is processed, the **Extract for UID Resub** checkbox selection is cleared and the **Submitted to TEA** status is cleared.

Note: If the **Set Demo Alpha Fields to Uppercase** field is selected on the Personnel > Tables > District HR Options page, the employee’s **Legal** and **Former Name** (**First**, **Middle**, **Last**, and **Maiden**) and **Address** fields are set to uppercase when a new employee demographic record is created or an existing record is updated.

❏ Under **Name**, complete the following **Legal** name fields:

Note: It is recommended that you have a copy of the employee's Social Security card available as the employee's legal name should be entered exactly how it is printed on the Social Security card.

Title	Click ⌄ to select a legal title for the employee.

First	Type the employee's first name. The field can be a maximum of 60 characters; however, only select pages display all characters. All other pages display 17 characters and truncate the remaining characters. Reported to SSA, IRS, and TRS.
Middle	Type employee's middle name. The field can be a maximum of 60 characters; however, only select pages display all characters. All other pages display 14 characters and truncate the remaining characters. If the employee does not have a middle name, leave the field blank. The middle name can be reported blank for employees only if the employee does not have a middle name on his identification documentation. Do not use text such as NONE or NA. Reported to SSA, IRS, and TRS.
Last	Type employee's last name. The field can be a maximum of 60 characters; however, only select pages display all characters. All other pages display 25 characters and truncate the remaining characters. Reported to SSA, IRS, and TRS.
Generation	Click ⌄ to select a generation code for the employee. The field can be blank. The field must be blank if the employee does not have a generation suffix on his name based on the identification documentation used for employment. Reported to SSA, IRS, and TRS.
Maiden Name	Type the employee's maiden name, if applicable. The field can be a maximum of 60 characters; however, only select pages display all characters. All other pages display 25 characters and truncate the remaining characters.

❑ Complete the **Former** name fields (if the employee has a former name):

Title	Click ⌄ to select a legal title for the employee.
First	Type the employee's first name. The field can be a maximum of 60 characters; however, only select pages display all characters. All other pages display 17 characters and truncate the remaining characters.
Middle	Type the employee's middle name. The field can be a maximum of 60 characters; however, only select pages display all characters. All other pages display 14 characters and truncate the remaining characters.
Last	Type the employee's last name. The field can be a maximum of 60 characters; however, only select pages display all characters. All other pages display 25 characters and truncate the remaining characters.
Generation	Click ⌄ to select a generation code for the employee.

❑ Under **Addresses**, complete the **Mailing** address fields for the employee.

It is recommended to avoid special characters including periods in the address fields to eliminate the possibility of errors when uploading PEIMS or UID data.

Number	Type the street number of the mailing address. The field can be a maximum of eight characters.
Street/P.O. Box	Type the street name or post office box number for the mailing address. The field can be a maximum of 20 characters.
Apt	Type the apartment number for the mailing address. The field can be a maximum of seven characters.
City	Type the city name for the mailing address. The field can be a maximum of 25 characters.
State	Click ⌄ to select a state for the mailing address.
Zip	Type the five-digit zip code for the mailing address. In the second **Zip** field, type the additional four digits of the zip code.
Country	Type the new or changed country of delivery.

If applicable, complete the following **Alternate** address fields. This information can be used to mail checks to employees at an address other than the mailing address. This address is used when the **Print Alternate Address** field is selected on the Pay Dates table.

❑ Under **Supplemental**, complete the following fields as needed:

Address	Type the new or changed supplemental street address or post office box number.
Country	Type the new or changed country of delivery.
Delivery Name	Type the name of the individual to whom mail is delivered if different than the employee.

Travel Commute Distance	Type the commute distance (the number of miles between the employee's home and assigned work location). Valid values are 0-999.9. This field can also be updated by the employee via the **Commute Distance Change** link on the Travel Reimbursement Requests page in EmployeePortal.

❑ Complete the following employee demographic fields:

Sex	Click ⌄ to select the employee's gender. Reported to TRS and TEA.
DOB	Type the employee's date of birth in the MM-DD-YYYY format. Reported to TRS and TEA.
Marital Stat	Click ⌄ to select the employee's marital status. Actual status and not the W-4 status for withholding tax calculations.

Citizenship	Selected by default to indicate that the employee is a U.S. citizen. Clear the field to indicate that the employee is not a U.S. citizen.
Deceased	Select to indicate that the employee is deceased. Otherwise, leave the field blank.
Driver's License	Type the employee's driver's license number. The field can be a maximum of 19 characters.
State	Click to select a state from which the employee's driver's license was issued.
DL Expir Date	Type the driver's license expiration date in the MM-DD-YYYY format.
Other Language	Select to indicate that the employee speaks another language. Otherwise, leave the field blank. If selected, the **Language** section is displayed allowing you to select the language(s) spoken by the employee. Click to select a language. Click **+Add** to add a row. Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved.

❑ Under **Ethnicity**, select all check boxes that apply for Ethnicity and Race options from the Employee Ethnicity and Race Data Questionnaire.

Hispanic/Latino	Select if the employee is of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race. Otherwise, leave this field blank.

❑ Under **Race**, select all races that apply (at least one race must be selected) regardless if **Hispanic/Latino** is selected:

American Indian Alaskan Native	Select if the employee has origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment.
Asian	

Home E-mail	Type the employee's home email address. The field can be a maximum of 45 characters. Click **Home E-mail** to send an email message to the employee's home email address using your default email program. The To: email address is populated if the **Home E-mail** field contains an email address.

Note: Foreign home email addresses are allowed (e.g., @yahoo.co.uk, @btamail.net.cn, etc.).

❑ Under **Emergency Contact Information**:

Name	Type the full name of the person to contact for the employee in case of emergency. The field can be a maximum of 26 characters.
Relationship	Type the relation of the contact person to the employee. The field can be a maximum of 25 characters.

Phone	Type the phone information for the contact person in the **Area Cd**, **Phone Nbr**, and **Ext** fields.
Emergency Notes	Type any data pertinent to the employee but not covered by other fields on the tab. The field can be a maximum of 25 characters.

❏ Click **Save**.

Other functions and features:

Documents	View or attach supporting documentation.

Note: If you are adding a new employee record (**Add Emp**) and the Document Attachments feature is enabled for your LEA, the **Documents** button is not displayed until the record is saved.

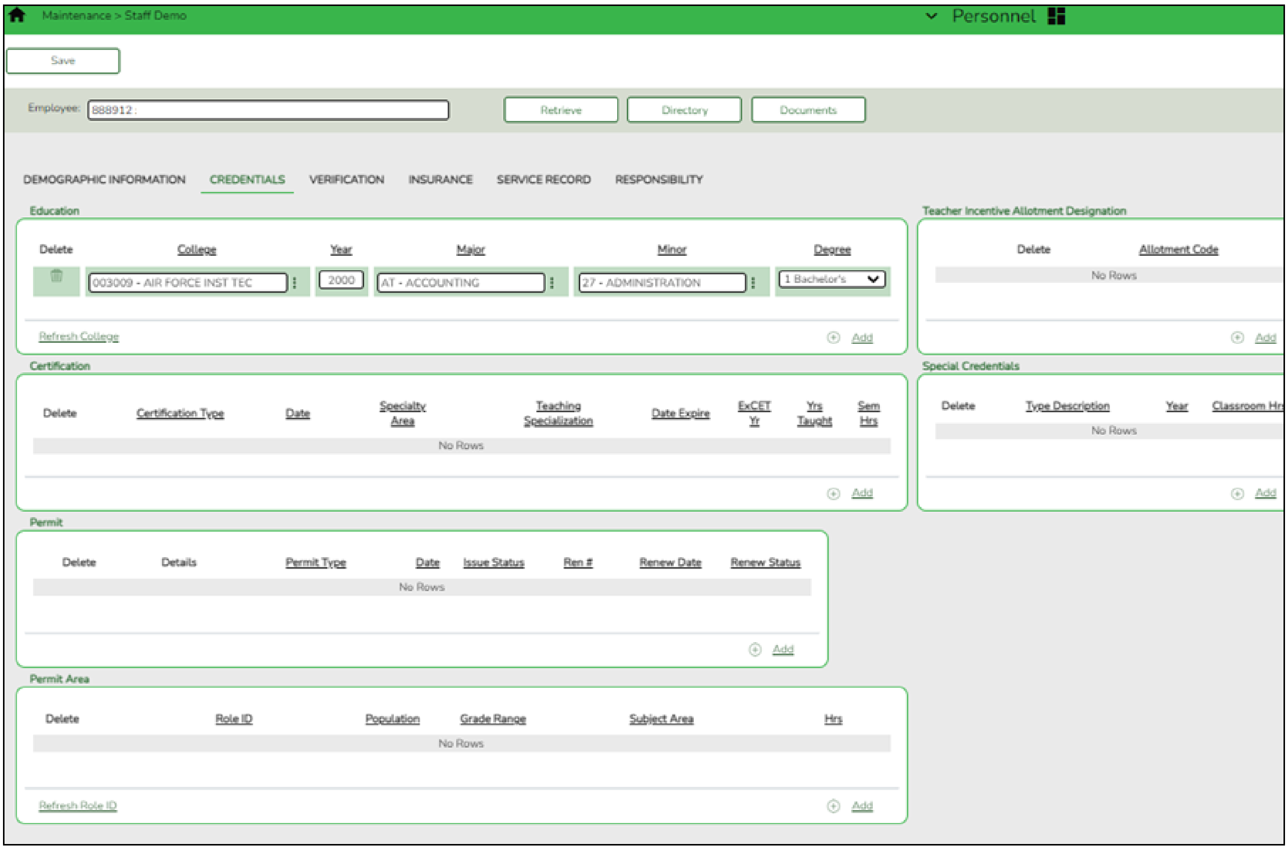
The following demographic tabs are not required to create a new employee record; however, they should be completed if the information is available.

Personnel > Maintenance > Staff Demo > Credentials

This tab contains the following employee information categories: education, certification, special credentials, permit, and permit area. The categories contain specific details about where the degree was received, as well as specifics about the certificates and special permits obtained by the employee.

This data is retrieved from the Personnel > Tables > Credential tabs.

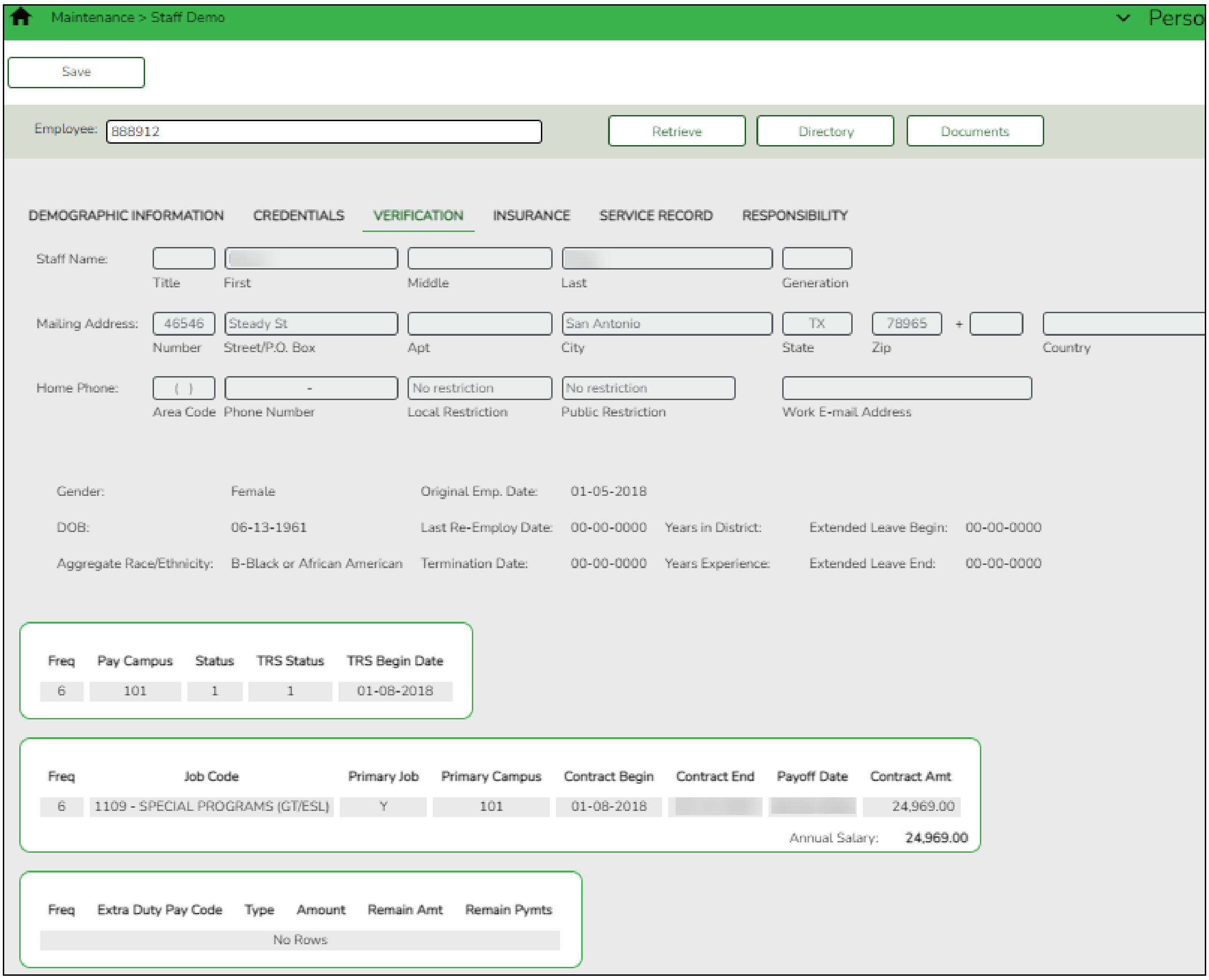
The **Teaching Specialization** field is a PEIMS Reporting Element if it is associated with a PEIMS PK Teacher Requirement. Per TEA, if an LEA offers a four-year-old prekindergarten program, the program is considered a high-quality prekindergarten program. For additional information about the High-Quality Prekindergarten Program, review TEA website: https://tea.texas.gov/Academics/Early_Childhood_Education/High-Quality_Prekindergarten_Program/.



Personnel > Maintenance > Staff Demo > Verification

This tab displays employee demographic information in addition to hiring, contract, and salary data. (Contract and salary data is based on the current logged-on pay frequency.)

Employee data on this page is display only for verification purposes and cannot be changed. Use the applicable maintenance pages to make changes.

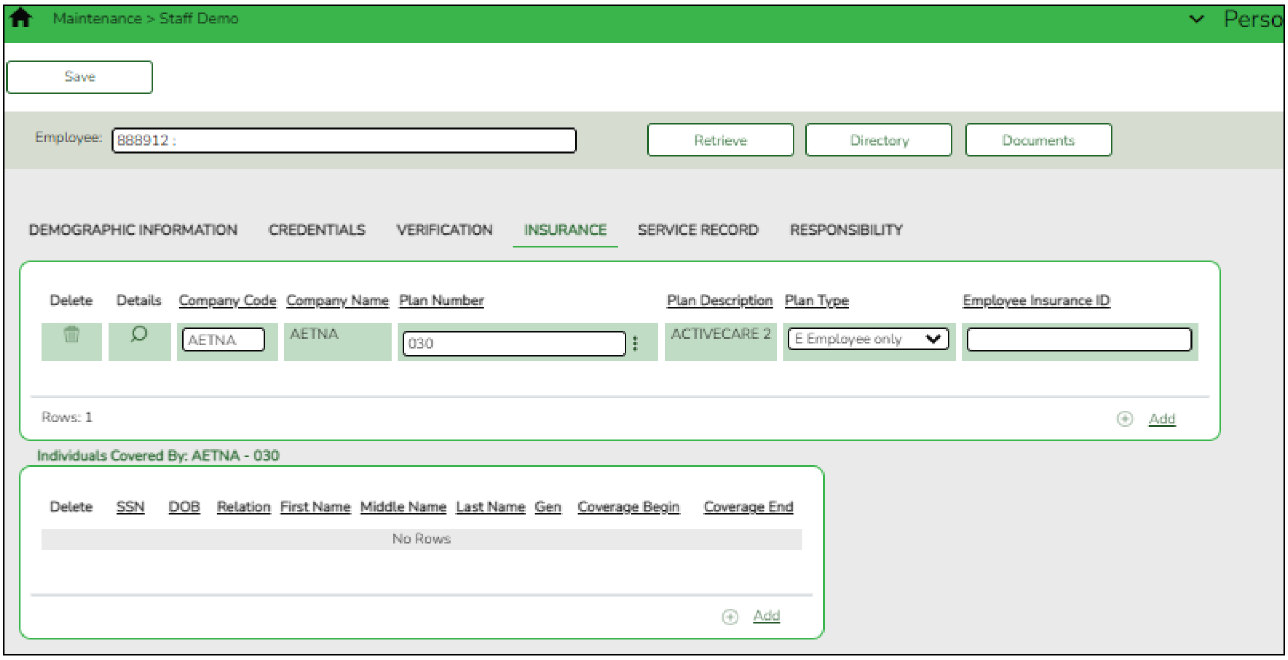


Personnel > Maintenance > Staff Demo > Insurance

This tab contains insurance information for the employee. The data includes the insurance company, the plan type, coverage information, the individuals covered by the plan, and the demographics of the covered dependents.

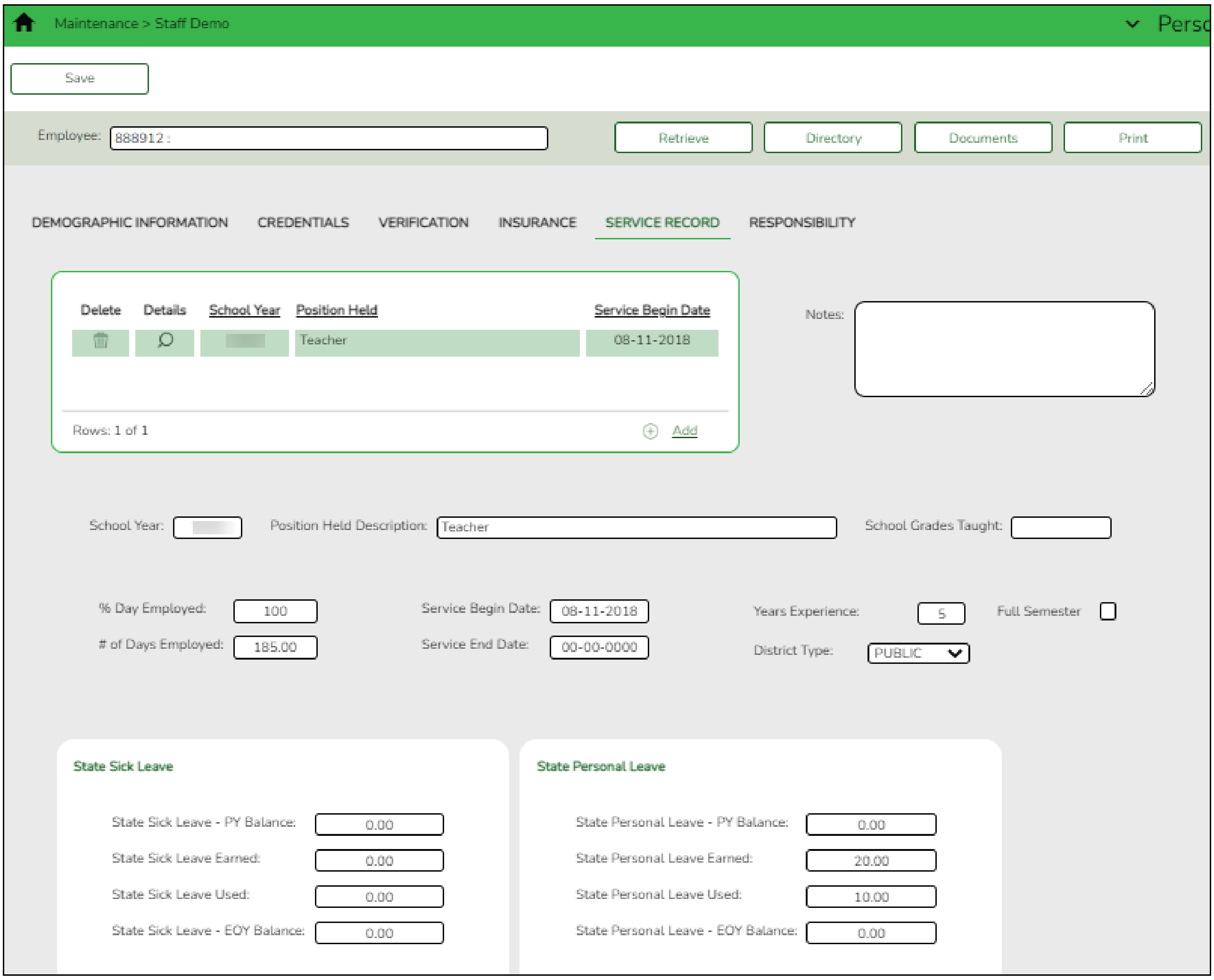
Since ACA is reported over a calendar year, some employees may have multiple rows if they changed insurance companies during the last enrollment period and you added insurance codes for each plan.

If this data is maintained throughout the calendar year for all applicable employees, you can use the Personnel > Utilities > Extract Insurance Data to 1095 Data page to extract insurance data from this tab to the Personnel > Maintenance > ACA 1095 YTD Data maintenance page(s). Most data will populate accurately; however, there are some records that may require manual edits.



Personnel > Maintenance > Staff Demo > Service Record

This tab contains service information for the employee. The data includes specific positions held, years of experience, service dates, as well as state and personal leave information. An employee may have multiple service records.



Personnel > Maintenance > Staff Demo > Responsibility

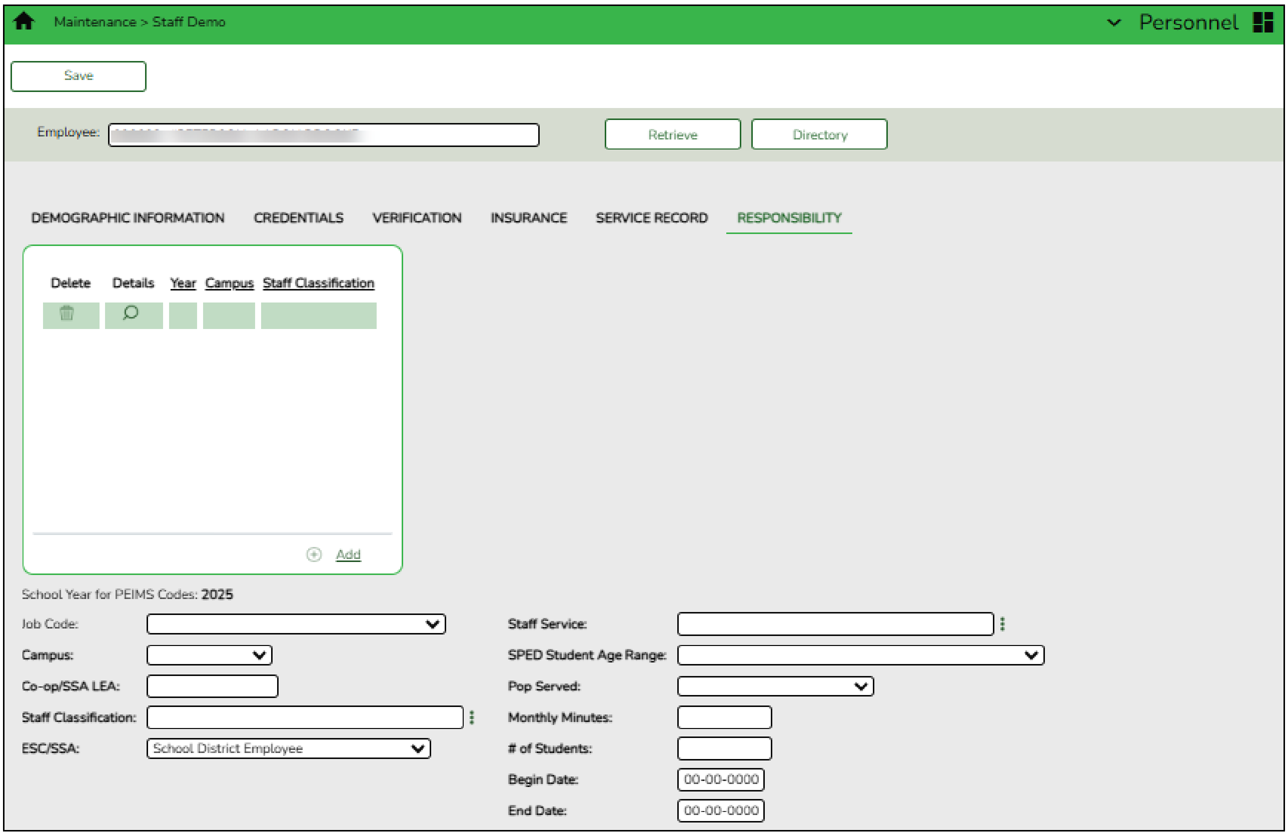
This tab is used to maintain job responsibility records for employees, which is used for state reporting purposes. Although responsibility records retrieve the necessary data from the Master Schedule for most classroom teachers, other employees such as administrators and classroom aides must be manually entered on this tab. Employees who have responsibilities at more than one campus, assume more than one role, and/or perform more than one type of service will have multiple records.

Review the Responsibilities - Quick Reference Chart.

Visit the TSDS Web-Enabled Data Standards website, select the appropriate **School Year**, and review the Data Components > Entities > StaffEducationOrganizationAssignmentAssociation Entity page for additional guidance on entering responsibility records.

Notes:

- Employees can have multiple responsibility records for the same year, provided that each record has a different **Staff Service** value.
- If you need to delete a responsibility record for multiple employees, use the Personnel > Utilities > Mass Delete > Responsibility Data page.



2. Enter job/pay data.

After the employee demographic record is created, use the following tabs to add job/pay data for the employee.

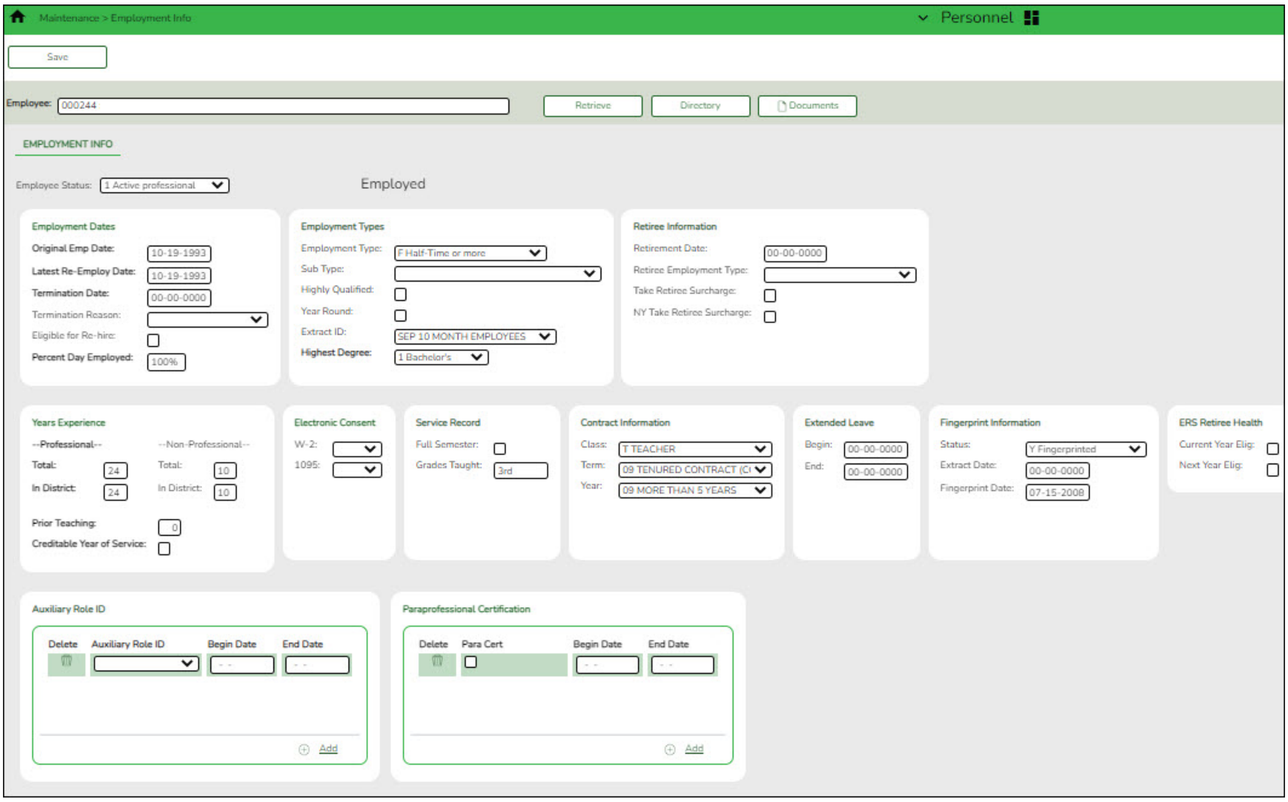
Employment Info

Personnel > Maintenance > Employment Info

This tab is used to maintain basic employment information for an employee. The data includes employment dates, job assignments, contract information, and job termination dates. Before using this tab, each employee must have a demographic record.

Note: If an employee starts after the first day of their contract, then the employee start date will match the **Begin Date** under **Calendar/Local Info** on the Job Info tab.

Sample Staff Job/Pay Data Images by Pay Type (prints separately)



The following fields are required:

- **Employee Status**
- **Highest Degree**
- **Percent Day Employed**
- **Original Employment Date** (or **Latest Re-Employ Date**)
- **Employment Type**

Although all of the fields on this tab are not required, some of the fields are used for reporting to TEA, TRS, IRS, and SSA.

Complete the necessary employee information fields.

As you are making changes to employment dates, review the following examples for additional guidance on terminations, rehires, and change in positions:

Example 1: Termination Date

Employee A works for ABC LEA and leaves employment on 05/30/2025. Therefore, a termination date of 05/30/2025 must be entered. Later, Employee A returns to ABC LEA with a new start date of 08/12/2025. The original **Termination Date** of 05/30/2025 remains in place and the new start date should be entered in the **Rehire Date** field.

Example 2: Change in Position

Employee B is hired by ABC LEA as a paraprofessional with a hire date of 08/30/2025. Later, they obtain a teaching certificate and move into a teaching position starting 01/06/2026. In this case, the paraprofessional position should be ended and paid off on the Job Info record through 01/05/2026. The new teaching position should then be added with a beginning contract date of 01/06/2026. **Note**: The employee should not have a termination date or a rehire date since this is a change in position and not a separation from employment.

Field	Description
Employee Status	Click to select one of the following one-character codes indicating the employee's status. This field is required. When extracting for TSDS reporting, staff records with a pay type of 1-3 are extracted if the **Employee Status** is *1 - Active professional*, *2 - Active auxiliary per*, *3 - Retired*, *4 - Resigned*, *5 - On Leave*, or *A - Long Term Substitute*. *0 - Pending* - An employee with a pending status indicates that the employee is new or inactive with a demo record. The employee does not need to be active to have payroll records set up in CYR or NYR. However, for NYR budget purposes, the employee must have payroll records in NYR. And, for CYR payroll purposes, the employee must have payroll records in CYR. • *1 - Active professional* • *2 - Active auxiliary per* • *3 - Retired* • *4 - Resigned* • *5 - On Leave* • *6 - Substitute* • *7 - Substitute retired* • *8 - Temporary* • *9 - Other* • *A - Long Term Substitute*

❏ Under **Employment Dates**:

Original Emp. Date	Type the original date on which the individual was employed by the LEA in the MM-DD-YYYY format. This date does not change if the employee left the LEA and then returned. This field is required to extract the employee for State Reporting. **Note**: Employees are only included in the Instructor directory in Grade Reporting if they have an **Original Emp. Date** or **Latest Re-Employ Date**. If an employee does not have an employment date or if the employee has a termination date that is greater than their latest employment date, then the employee is not included in the Instructor directory.
Latest Re-Employ Date	Type the date the employee began his current period of employment in the MM-DD-YYYY format. The field applies only to employees who worked for the LEA, left the LEA, and then returned. If the employee never left the LEA, the field is left blank.

Termination Date	Type the date that the termination of the employee went into effect in the MM-DD-YYYY format. This field is used only for employees who have been terminated from their positions. When a date is entered in the **Date** field, the system deselects all remaining months for the year in the **Unemployment Eligibility** section, except for the actual termination month. The termination date and reason are used to exclude the employee from TEA reporting.
Extract for TSDS	Select to include the employee in TSDS Staff Domain extracts regardless of their employment status. This allows those individuals with a **Not Employed** status to be included in the TSDS extract process. This option is useful for job abandonment instances where a termination date must be entered.
Termination Reason	Click to select the reason the employee was terminated. The termination reasons are maintained on the Personnel > Tables > Job/Contract > Termination Reason tab.
Eligible for Re-hire	Select if the employee is eligible for rehire.
Percent Day Employed	Type the percentage of a standard district (LEA) workday for which the employee is hired to work. This field is required. For an employee on contract, the percentage can be determined directly from the contract: full-time = 100, half-time = 050, and so on. For a non-contract employee, the percentage can be determined as follows. **Example**: The standard workday for the LEA is 7 hours. An employee is hired to work for 4 hours per day. This data element is coded as 057 for the employee because 4/7 = .571 is rounded down. 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 LEA workday, not the job. The field can be a maximum of three digits.
Pct Day Employed Effective Date	Type the employee's start date or the date they were hired. If the **Percent Day Employed** is changed, type the effective date of the change. This field only applies to employees with an **Employee Status** of 1, 2, 3, 4, 5, or A, and is only enabled when the **Percent Day Employed** is changed. If the **Percent Day Employed** is changed, the **Pct Day Employed Effective Date** is required.

❑ Under **Employment Types**:

Employment Type	Required TRS reporting field. Click to select the employee's employment type code. • *F - Half-Time or more* • *M - Temporary* • *P - Less than Half-Time* • *S - Substitute*
Sub Type	Click to select the type of substitute teacher. This field is only displayed if the **Pay Type** field is set to 4 (Substitute) on the Job Info tab.

Highly Qualified	Select to indicate that the teacher is highly qualified.
Year Round	Select if the employee is employed on the year-round calendar.
Extract ID	Type a three-character, locally assigned code (e.g., 187 - 187-day employees, JUL - employees who start work in July, 12M - 12-month employees, etc.) for grouping employees, or click ⌄ to select an extract ID. These codes are used to group employees for mass updates. The extract ID information is maintained on the Personnel > Tables > Job/Contract > Extract ID tab.
Highest Degree	Click ⌄ to select the highest degree the employee received from a certified learning institution. This field is required.

❑ Under **Retiree Information**:

Retirement Date	Type the employee's retirement date in the MM-DD-YYYY format.
Retiree Employment Type	Required TRS reporting field. (for retirees) Click ⌄ to select the retired employee's retiree employment type code. • *C - Combination of Substitute and Half-Time or less* • *F - Full-Time* • *H - Half-Time or less* • *S - Substitute*
Take Retiree Surcharge	Select if the LEA should pay the TRS surcharges for retirees. When selected, the TRS retiree pension surcharge (based on gross pay) is calculated, and the TRS-Care surcharge (RI deduction code) is assessed during payroll calculations. Therefore, extreme care should be taken to make sure that the check box is set accurately for the process being performed. Retiree surcharges depend on retiree dates and vary based on the retiree; therefore, it is important to reference the TRS Reporting Entity Portal for specific details.
NY Take Retiree Surcharge	Select if the LEA should pay the TRS surcharges for retirees for next year processes. When selected, the TRS retiree pension surcharge (based on gross pay) is calculated, and the TRS-Care surcharge (RI deduction code) is assessed during the Interface NY Payroll to NY Budget extract.

❑ Under **Years Experience**:

Professional column:

Total	Type the total years of professional experience for the employee. The field can be a maximum of two digits. This information is included in the Teacher Service Record.
In District	Type the total years of professional experience for the employee in the LEA. The field can be a maximum of two digits.
Prior Teaching	Type the total number of years that the employee has previously held a teaching position in one or more educational institutions.

Creditable Year of Service	Select to indicate that the employee is a teacher who currently qualifies for the Teacher Incentive Allotment or has been submitted by the LEA for a new or change of designation, and has been employed by the LEA and compensated or will be compensated by the LEA for a creditable year of service. TEA defines a creditable year of service as 90 days at 100% of the day (equivalent to four and one-half months or a full semester) or 180 days required at 50-99% of the day and compensated for that employment.

Non-Professional column:

Total	Type the total years of non-professional experience for the employee. The field can be a maximum of two digits.
In District	Type the total years of non-professional experience for the employee in the LEA. The field can be a maximum of two digits.

Note: When extracting teacher service records, the **Years Experience** fields are populated based on the **TRS Member Pos** field from the Job Info page, and the **Years Experience** fields from the Employment Info page. Refer to the Extract Teacher Service Record Checklist.

❏ Under **Electronic Consent**:

W-2	Click to select whether or not the employee provided consent to receive the W-2 form electronically rather than receive a printed, mailed copy. This field is updated to reflect any changes made by the employee in EmployeePortal. If the **W-2 Electronic Consent** field is not selected on Payroll > Tables > District EP Options > EmployeePortal Options tab, then this field is not applicable. • If *Yes* is selected, the employee must log on to EmployeePortal to print the W-2. • If *No* is selected, the employee will receive a printed, mailed copy from the LEA. **Note**: Inactive employees can continue to view and print their W-2 information in EmployeePortal depending on the LEA. If the LEA opts to restrict inactive employee access (changes the EmployeePortal password or deletes the user's access), the employee will receive a printed, mailed copy of their W-2.
1095	Click to select whether or not the employee provided consent to receive the 1095 form electronically rather than receive a printed, mailed copy. This field is updated to reflect any changes made by the employee in EmployeePortal. If the **1095 Electronic Consent** field is not selected on Payroll > Tables > District EP Options > EmployeePortal Options tab, then this field is not applicable. If *Yes* is selected, the employee must log on to EmployeePortal to print the 1095. If *No* is selected, the employee will receive a printed, mailed copy from the LEA. **Note**: Inactive employees can continue to view and print their 1095 information in EmployeePortal depending on the LEA. If the LEA opts to restrict inactive employee access (changes the EmployeePortal password or deletes the user's access), the employee will receive a printed, mailed copy of their 1095.

❏ Under **Service Record**:

Full Semester	Select if the employee worked a full semester that was less than 90 days.
Grade Taught	Type the grades the employee has taught (e.g., K-5). This information is included in the Teacher Service Record.

❏ Under **Contract Information**:

The contract information is created and maintained on the **Personnel > Tables > Job/Contract** tabs.

Class	Click to select the code that identifies any contract type or class identified by the LEA.
Term	Click to select the code that identifies the terms of the contract held by the employee. Examples would be continuing, probationary, 1 year, and no contract.
Year	Click to select the two-digit code that identifies in which year of the contract period the employee is currently working. For example, 02 would indicate the second year of the contract period.

❏ Under **Extended Leave**:

Begin	Type the date on which the employee begins an extended leave of absence in the MM-DD-YYYY format.
End	Type the date on which the employee ends the extended leave of absence in the MM-DD-YYYY format. The end date cannot be prior to the begin date.

❏ Under **Fingerprint Information**:

The **Fingerprint** fields are used only for tracking purposes.

Status	Click to select the code to indicate the status of an employee's data.
Extract Date	(This field is obsolete as the Extract Fingerprint utility is not available in ASCENDER.) The extract date is populated when the employee's data is extracted using the Extract Fingerprint utility. You can change the extract date, if necessary.
Fingerprint Date	Type the date on which the employee's fingerprint data was entered in the MM-DD-YYYY format.

❏ Under **ERS Retiree Health**:

Current Year Elig	Select if the employee is an Employment Retirement System of Texas (ERS) retiree and is eligible to receive health coverage for the current year through ERS. If selected, the employee does not pay the Member Insurance Contribution (IN), and the employer does not pay the Reporting Entity TRS-Care payment (RI).
Next Year Elig	Select if the employee is an Employment Retirement System of Texas (ERS) retiree, and is eligible to receive health coverage for the next year through ERS.

❏ Under **TRA Years Experience**:

TRA Teaching Experience	Type the two-digit number of verifiable years of teaching experience as a classroom teacher as described in TEC §48.158. This field is required for teachers (Staff Classification 087), even if they only have 0–2 years and will not generate funding. The field default is zero.
TRA Eligibility	Select to indicate that the teacher works in an academic instructional setting for an average of at least four hours per day. **Note**: Staff are not required to hold a certificate but must meet the following criteria: ◦ Teach in an academic instructional setting for at least an average of four hours per day (including planning periods). ◦ Serve in a role that would typically require State Board for Educator Certification (SBEC) teaching credentials. Responsibilities should be reported in either the Teaching and Learning Entity or the Staff Education Assignment Association Entity with a Staff Classification of 087, supporting the reported eligibility. For additional guidance, review the following: ◦ TWEDS > Staff Domain ◦ TEC Sec. 48.158 ◦ TEA website on House Bill 2

❏ Under **Auxiliary Role ID**:

Auxiliary Role ID	Click to select the employee's auxiliary role ID, which indicates the capacity in which a non-exempt auxiliary employee serves. This must be reported for all employees who serve in a non-professional or non-paraprofessional role. Employees reported with an Auxiliary Role ID are reported with the base pay associated with object code 6129. For TSDS reporting purposes, multiple auxiliary roles can be entered without an end date.
Begin Date	Type the effective date of the employee's selected auxiliary role ID in the MM-DD-YYYY format, or select a date from the calendar. This date is required if the **Auxiliary Role ID** field is added or changed.
End Date	Type the end date of the employee's selected auxiliary role ID in the MM-DD-YYYY format, or select a date from the calendar. An end date should only be entered when the position has ended.

Notes:

The drop-down options are populated based on the year in the **School Year for PEIMS Codes** field on the Tables > District HR Options page.

This data is part of the StaffEducationOrgEmploymentAssociationExtension complex type collected in PEIMS Submission 1.

Professional and paraprofessional staff may also be reported with an Auxiliary Role ID if they serve the LEA in a non-professional or non-paraprofessional role. A classroom teacher (Role ID 087) who also drives a bus route for the school would require an Auxiliary Role ID to be reported. In this case, the employee would have at least two payroll accounting entries: one with object code 6119, and one with object code 6129. Because there may be duplication between Role ID and Auxiliary Role ID, the LEA must use its discretion in determining if the employee is serving in a professional or non-professional capacity.

❏ Under **Paraprofessional Certification**:

Para Cert	Select to indicate that the paraprofessional employee is certified. This field must be selected if the responsibility is 033 - Educational Aide and the population served is 06 - Special Education students.
Begin Date	Type the effective date of the employee's paraprofessional certification in the MM-DD-YYYY format, or select a date from the calendar. This date is required if the **Para Cert** checkbox is selected or changed.
End Date	Type the end date of the employee's paraprofessional certification in the MM-DD-YYYY format, or select a date from the calendar.

❏ Click **Save**.

Notes:

- The **Estimated Annual Salary (Hourly Employees Only)** (pay type 3) section was removed from this page. For hourly employees, use the Payroll > Maintenance > Staff Job/Pay Data > Job Info tab to update contract totals with a zero balance for reporting purposes.
- The **Unemployment Eligibility** section was removed from this page. Use the Payroll > Maintenance > Staff Job/Pay Data > Pay Info tab to update unemployment eligibility.

Pay Info

Payroll > Maintenance > Staff Job/Pay Data > Pay Info

This tab is used to maintain a range of codes and values to identify and describe an employee's pay information. This record includes pay status, TRS information, FICA, business allowances, federal tax information, and contract totals.

Sample Staff Job/Pay Data Images by Pay Type (prints separately)

The following fields are required:

- **Pay Campus**
- **TRS Status** code
- **Health Insurance Code**

Although all of the fields on this tab are not required, some of the fields are used for reporting to TEA, TRS, IRS, and SSA.

Complete the necessary pay information fields.

Note: If changes are made to the **W-4 Withholding Certificate**, **Tax Exempt**, or **FSP Staff Salary Data** fields in a current year pay frequency, a message is displayed prompting you to allow the same updates in the next year pay frequency, and vice versa. For example, if you made changes in pay frequency 5-Semimonthly CYR and you clicked **Yes** to allow the changes, those changes are updated in pay frequency E-Semimonthly NYR.

Field	Description
Pay Status	Click to select the code indicating whether an employee is active or inactive for payroll calculation purposes.
Pay Campus	Click to select the employee's pay campus. This is the campus that employs and pays the employee and distributes their paycheck if they receive a physical check. This field is required.
Pay Dept	Type the code used by the LEA to further categorize the employee.
Dock Rate	Type the standard dock rate to be used if not using the daily rate. This is the rate used when the employee has a leave transmittal that is causing a dock and the **Dock Type** is set to *A- Alternate rate* for the transmittal leave type on the Tables > Leave > Leave Rates tab.
Tax Exempt	Select if the employee's salary is exempt from taxes. If selected, the **W-4 Withholding Certificate** fields are disabled.

Field	Description
Unemployment Elig	Select if the employee is eligible for unemployment insurance. **Notes**: According to the South Texas Region of the Texas Workforce Commission, all individuals should be flagged to accumulate unemployment gross, and then submitted in the quarterly file submission. This does not mean that substitutes are eligible to file for unemployment, but that the wages earned as a substitute are figured in the calculation in the event that his status changes to that of a regular employee. According to a case precedent of the Texas Workforce Commission (TWC) Commissioners and a recent interpretation by the TWC tax department, school superintendents are now considered employees for the purpose of reporting wages to the TWC. School superintendents' wages should be reported along with all other employees when submitting quarterly wage reports. The TUCA may be viewed at: http://www.texasworkforce.org/laws/tuca/enabstats.html#txlaborcode
FICA Eligibility	Click ⌄ to select the code indicating the employee's eligibility for FICA/Medicare. • *M Subject to medicare* • *N Not subject to FICA* • *Y Subject to FICA tax* Review the FICA/Medicare - Quick Reference page for additional details.
W4 Marital Status	This field was disabled as of 12/31/2019. Click ⌄ to select the code indicating the marital status of the employee. Click **Save** to save the data. If a change to the **W4 Marital Status** field is saved in the current year, you are prompted to save the change to the next year's pay information. If you make a change to next year, you are prompted to save the change to the current year's pay information. Click **Yes** to copy the record, or click **No** to continue without copying the record. **Caution**: The **W4 Marital Status** and the **Nbr of Exemptions** fields can each be saved to the next year (or current year, as applicable). If only one of these two fields has been updated, both of the fields are copied to next year (or current year). If both fields are updated, both fields are copied to next year (or current year).

Field	Description
Nbr of Exemptions	This field was disabled as of 12/31/2019. Type a two-digit number of exemptions claimed by the employee for federal income tax withholding. If 99 is entered, no tax is calculated; however, withholding gross is accumulated. Click **Save** to save the data. If a change to the **Nbr of Exemptions** field is saved in the current year, you are prompted to save the change to the next year's pay information. If you make a change to next year, you are prompted to save the change to the current year's pay information. Click **Yes** to copy the record, or click **No** to continue without copying the record. **Caution**: The **W4 Marital Status** and the **Nbr of Exemptions** fields can each be saved to the next year (or current year, as applicable). If only one of these two fields has been updated, both of the fields are copied to next year (or current year). If both fields are updated, both fields are copied to next year (or current year).
IRS Lock-In Letter	Select this field to indicate that the IRS has determined that this employee does not have sufficient withholding and has issued a Lock-in Letter to restrict changes to the employee's W-4 information. **Note**: This field is shared across all pay frequencies where the employee exists; therefore, changes to the logged-on pay frequency are effective in any other pay frequency and vice versa. If selected: ◦ The **W-4 Withholding Certificate** and **Tax Exempt** fields on this tab are disabled preventing any changes from being made. ◦ In EmployeePortal, on the Self-Service Profile page, the **IRS Lock-in Letter** field is displayed and set to *Y*, and the **W4 Marital Status Information** fields are disabled preventing the employee from making any changes. For more information about the IRS Lock-in Letter, visit https://www.irsvideos.gov/Individual/Resources/WhatsALock-InLetter.

❏ Under **W-4 Withholding Certificate**, indicate the employee's W-4 withholding details. If **Tax Exempt** is selected, these fields are disabled.

Refer to the IRS W-4 Instructions for complete details about completing the following fields. Also, be sure to review Publication 15-T Federal Income Tax Withholding, which contains the withholding tax calculations and the FAQs on the 2020 Form W-4 page, which contains helpful information.

1:Filing Status	Click to select the employee's filing status. • *H Head of household* • *M Married filing jointly* • *S Single or Married filing separately*
2: Multi-Jobs	Select to indicate that there are multiple jobs in the household.

3: Children under 17	This field is used to determine the amount of child tax credit an employee may be able to claim for qualifying dependent children under the age of 17 when filing their tax return. The amount is calculated by multiplying the number entered in this field by the designated amount in Step 3 on the W-4 form for the applicable reporting tax year. Refer to Pub. 501, Dependents, Standard Deduction, and Filing Information for additional eligibility requirements. Type the number of children in the household under the age of 17 as of December 31.
3: Other Dependents	This field is used to determine the amount of tax credit an employee may be able to claim for other qualifying dependents when filing their tax return. The amount is calculated by multiplying the number entered in this field by the designated amount in Step 3 on the W-4 form for the applicable reporting tax year. Refer to Pub. 501, Dependents, Standard Deduction, and Filing Information for additional eligibility requirements. Type the number of other dependents in the household.
3: Other Exemptions	Type the amount of any other exemptions that may affect the employee's federal income tax withholding.
4a: Other Income	Type the amount of any other income that may affect the employee's federal income tax withholding.
4b: Other Deductions	Type the amount of any other deductions that may affect the employee's federal income tax withholding.

❏ Under **TRS**:

Status	Required TRS reporting field. Click ⌄ to select the code indicating the employee's status in regard to having a TRS deposit computed. • *1 Eligible* • *2 Non-eligible* • *3 Substitute* • *4 Retirement waived* • *5 Retired* • *6 Other (non-eligible)*

IMPORTANT: In order for the retiree pension surcharge to apply to an employee, the **Status** field must be set to 4 or 5, and **Take Retiree Surcharge** on the Employment Info page must be selected. (In the next year pay frequency, **NY Take Retiree Surcharge** should be selected for the retiree pension surcharge to apply to an employee.)

Begin Date	Type the date the employee started contributing to TRS in the MM-DD-YYYY format. Be sure to log on to the TRS Reporting Entity Portal to verify the employee's information. **New Member Fee Information**: If the employee has satisfied the 90-day New Member requirement per the TRS Portal, the LEA should determine and enter a date outside of the 90-day period to prevent the new member Employer TRS Contribution from being calculated. For example, some LEAs may use the earliest date from the employee's service record.
End 90 Day Period	Type the end date of the 90-day waiting period in the MM-DD-YYYY format. This field is populated by the system if: Pay Status = 1 - Active TRS Status = 1 - Eligible Begin Date >= 09-01-2005 **Note**: The **End 90-day Period Date** no longer has to be blank in order for the **End 90 Day Period** link to function. Click **End 90 Day Period** to calculate the end date of the 90-day waiting period. If the date in this field is within the TRS Month for the processed pay dates in the Pay Dates table, the employee is not included on the Statutory Minimum Report #373 (HRS4000). If the distribution is to a federal fund, the employee is not included in the TRS 3 Report (HRS4050). However, the employee is included in the TRS 489 Report (HRS4100) and on the Payments for New Member report (HRS9865).

❑ Under **FSP Staff Salary Data**:

Health Ins Code	Click ⌄ to select a code that indicates the employee's eligibility. **Note**: If the LEA participates in the TEA health insurance plan, the employee must be TRS eligible (i.e., TRS Status Code must be set to 1) and have a Deduction Code with the abbreviated code of AC. Also, the AC deduction must have a remaining payment greater than zero. If an employee and spouse are eligible for and are participating in the health insurance program and one employee is insured through the spouse's policy, only one person receives the TEA State Contributions for both in his paycheck. See Deductions, TEA Contrib Factor for guidance on how to handle this situation. Select *Y Eligible participating Health Insurance* for employees who participate in the TEA health insurance. When this field is set to Y, the employee is eligible for the TEA health insurance contribution if it is used by the LEA (see Tables > District HR Options). Select *S Eligible spouse participating* for employees that participate in the TEA health insurance, whose spouse works for the same LEA, service center, or charter school and are insured through the spouse's policy. Select *W Eligible Health Insurance* for employees who are eligible but choose not to participate in the TEA health insurance. Select *N Not eligible* for employees who are not eligible for the TEA health insurance.

FSP Staff Data Code	Click to select the employee eligibility code, or leave blank. This field is reported on the FSP Staff Salary Report and the Health Insurance Participation Report and is required. • *F - Full-Time* (e.g., classroom teacher, librarian, counselor, nurse, or other staff) • *P - Part-Time* (e.g., classroom teacher, librarian, counselor, nurse, or other staff)

❏ Under **Totals**, the following fields contain display-only data:

State Min. Salary	The minimum salary assigned to the employee is displayed as entered in the **State Min Salary** field under **State Info** on the Job Info tab.
Extra Duty	The total dollar value of all S-type extra duty assignments for the employee is displayed under **Extra Duty Pay** on the Pay Info tab.
Contract Amt	The total amount of pay due to the employee during the current contract period is displayed as entered in the **Total** field under **Contract Info** on the Job Info tab. This amount includes the total gross salary and all G-type extra duty assignments.
Contract Balance	The total amount remaining to be paid to the employee during the current contract period is displayed as entered in the **Balance** field under **Contract Info** on the Job Info tab.

Extra duty account type detail

The extra duty information is maintained on the Personnel > Tables > Salaries > Extra Duty tab.

❏ Under **Extra Duty Pay**:

❏ Click **+Add** to add a row.

Extra Duty Pay Code	Click to select the two-digit code of the additional job assignment. This information is defined in the Extra Duty table.
Type	The single character account type code (e.g., G = standard gross salary or S = supplement pay) that identifies the type of salary based on the extra duty pay code selected is displayed.
Amount	The pay amount authorized for the selected extra duty pay code is displayed.
Remain Amt	If the account type for the job code is S - Supplemental pay, the field is active and you can type an amount remaining for this job code. If the account type is G - Standard Gross pay, the field is disabled. For S account types, if the employee's primary job is being paid off, the remaining amount will be paid to the employee.
Remain Pymts	If the account type for the job code is S - Supplemental pay, the field is active, and the user can type the number of payments remaining for this job code. If the account type is G - Standard Gross pay, the field is disabled.

❏ Click **Refresh Type/Amount** to update the Amount field with the amount in the table associated with the selected extra duty pay code.

Notes:

Extra duty pay codes that are account type “S - Supplemental pay” must be manually added to the Distributions tab as “XTRA - Extra Duty” job codes. Extra duty pay codes that are account type “G - Standard Gross pay” must have the job amount manually added to the Job Info tab, **Contract Info Total** field for one of the non-XTRA jobs assigned to the employee. The distributions also need to be added or adjusted manually. Remaining balances for extra duty jobs that are account type “S - Supplemental pay” will be paid off when the primary job is in contract payoff.

Extra duty pay totals include B (Non-TRS taxable business allowances), G (Standard gross pay), S (Supplemental pay), and T (Non-TRS non-taxable business allowances) type accounts.

The bank information is maintained on the Payroll > Tables > Bank Codes > Bank Codes tab.

For security purposes, any updates saved to the employee's bank information will generate an email to the employee notifying them of the change. The email is sent to the employee's **Work** and/or **Home E-mail** address listed on the Personnel > Maintenance > Staff Demo > Demographic Information page. If both email addresses are populated, the email will be sent to both emails. If an email is not available, then the employee will not receive an email.

❏ Under **Bank Info**:

❏ Click **+Add** to add a row. Employees can designate from which accounts their net pay is to be distributed. Multiple entries can be made.

Bank	Type the bank or credit union code, or click ⋮ to select the three-digit code identifying the bank or credit union to which the employee is depositing funds. Employees can have multiple bank deposit records.
Bank Acct Nbr	Type the bank account number that corresponds to the bank to which the employee is depositing funds. The number is provided for direct deposit and can be a maximum of 17 digits.
Bank Acct Type	Click ⌄ to select the one-digit code that represents the bank account type (i.e., checking or savings).
PreNote	Select if the bank account information is to be included in a prenote EFT file used to notify banks of employees who are new to the EFT direct deposit program. After the prenote EFT file has been created, the **PreNote** field is cleared.
Bank Acct Amt	Type the allocated direct deposit amount for each designated bank account. Leave at zero for the remainder of funds to be allocated. One bank account record with a zero amount must exist to indicate where the remainder of the employee’s pay is to be deposited. If there is not sufficient pay to cover a specified amount for a bank record, then the bank record is ignored and the amount is recorded to the zero amount bank record. **Example**: The employee has two direct deposit accounts, one account has $1000 allocated to it and the other account is set to zero. If the employee is docked pay and does not receive enough pay to cover the $1000, then the full direct deposit amount is sent to the zero amount account.

❏ Click **Save**.

A message is displayed prompting you to update bank records to next year.

- Click **Yes** to copy the records to next year.
- Click **No** to continue without copying the record to next year.

Job Info

Payroll > Maintenance > Staff Job/Pay Data > Job Info

This tab is used to maintain a wide range of information about the one or many jobs the employee may be assigned. This data includes calendar data, contract information, accrual information, and specifics about the employee's salary pertaining to each job.

Sample Staff Job/Pay Data Images by Pay Type (prints separately)

The following fields are required:

- **Job Code** (from a local-defined table; 9999 is the default)
- **Primary** (must be selected for one job code)
- **% Assigned** (multiple jobs should equal 100%)
- **Primary Campus** (table-defined code)
- **Pay Type** (1 for professional staff (exempt) and 2 for auxiliary or paraprofessional staff. If set to 3 or 4, account distribution is not required.)
- **TRS Member Pos**
- **Begin Date**
- **End Date**

If the contract **Total** (salary) field is populated, the Distributions tab must be completed before the record can be saved.

Although all of the fields on this tab are not required, some of the fields are used for reporting to TEA, TRS, IRS, and SSA.

Complete the necessary job information fields.

❑ Click **+Add** to add a row.

Field	Description
Job Code	Type the four-digit job code to which the employee is assigned, or click ⋮ to select a job code from the Job Codes list. Job codes are maintained on the Personnel > Tables > Job/Contract > Job Codes tab.
Primary	Select if this is the employee's primary job. An employee may only have one primary job.

Field	Description
% Assigned	Type the number which indicates the total percentage of the employee's responsibilities represented by the job entered. For example, if the job represents half of his total assignment, type 50. **Note**: If the employee has multiple jobs, it is your responsibility to ensure that the job percent assigned is accurate based on the total contract amounts for all jobs, excluding XTRA-coded jobs. The percent assigned is used when distributing absence deductions and refunds across jobs and in next year budget calculations.
Pay Type	Refer to the Quick Reference by Pay Type document for more information on pay types. If the LEA does not use Position Management, the **Pay Type** field is enabled. If the LEA uses Position Management and **Using PMIS** is selected on the District Administration > Options > Position Management page, then the **Pay Type** field is disabled. If a new job record is added, the **Pay Type** field default is *4*. The **Pay Type** field is provided by PMIS when data is moved from PMIS to payroll.
Primary Campus	Click ⌄ to select the primary campus for the job code. This is the campus where the employee performs the selected job. If an employee has multiple jobs, they may have multiple primary campuses depending on where each specific job is being performed. The primary campus is not the pay campus. This field is used for informational and reporting purposes.
Dept	Type the code used by the LEA to further categorize the employee. The field can be a single digit.

❏ Under **Contract Info**:

Pay Type	PEIMS Reporting Element Click to select the one-digit code that best describes how the employee's pay is calculated by the system. If this field is set to pay type 3, the **Pay Rate** field is required. This is a required field. Pay type 1 employees are generally those employees that are under contract such as superintendents, principals, instructors, etc. (exempt employees under FLSA) whose pay rate remains constant over the course of their contract. Pay type 2 employees are generally paraprofessional, auxiliary, or clerical (nonexempt employees under FLSA) whose pay rate usually remains constant over the course of the year but are eligible for overtime. Pay type 3 employees are typically hourly employees (nonexempt under FLSA) who are paid only when hours are earned, so their pay rate fluctuates every pay date. Pay type 4 employees are substitutes that are paid at either an hourly or daily rate of pay and only when they work. **Notes**: When a new employee is created and **Employee Must Be Assigned a Position Prior to Creating Payroll Record** is selected on the District Administration > Options > Position Management page, the **Pay Type** field is automatically set to 4. When an existing job is set to a pay type other than 4, it can only be changed to 4 when the **Employee Must Be Assigned a Position Prior to Creating Payroll Record** is selected on the District Administration > Options > Position Management page.
Pay Grade	Click to select the pay grade at which the employee is paid. The field is used to identify the correct salary amount on the salary table. Pay grades are maintained on the Personnel > Tables > Salaries > Local Annual and Hourly/Daily tabs.
Pay Step	Click to select the pay step at which the employee is paid. The field is used to identify the correct salary amount on the salary table.
Sched	Click to select the local subschedule of the employee's pay grade and step. The field is used to identify the correct salary amount on the salary table.
Max Days	Type the number of contract days which relate to the correct salary on the salary table. **Note**: If **Use PMIS** is selected on the District Administration > Options > Position Management page, the **Max Days** field is enabled.

Hrs Per Day	Type the standard number of hours per day to be worked by the employee. The field is disabled for all XTRA coded jobs and is calculated automatically for pay type 2 employees when you click **Calculate**. The field is used exclusively by a timekeeping system when the Merge Payroll Transactions Files is used and regular hours exist in the import file. **Note**: For pay type 3 employees, the **Hours** field on the Midpoint Salary table must be populated. Data from the **Hours** field on the Midpoint table populates the **Hrs/Day** field on the Job Info page. The **Hrs/Day** field can be modified on the Job Info tab, if necessary.
Incr Pay Step	Select if the employee is eligible for an incremental pay step.
Total	Type the contract amount for each of the employee's job codes. Extra duty pay codes that are account type “G - Standard Gross pay” must have the job amount manually updated in the **Contract Total** field.
Balance	Type the total amount remaining to be paid to the employee during the current contract period.
# of Annual Pymts	Type the total number of annual payments due the employee. This number may differ from the contract months when an employee is on a 10-month contract but receives 12 monthly checks.
Remaining Pymts	Type the number of payments remaining to be made to the employee during the current contract period.
Concept	This field is display only and identifies the salary table used to compute the employee’s salary (e.g., local annual, hourly/daily, or midpoint).
# of Months in Contract	Type the total number of months the employee is scheduled to work.
Stat Min Days	Click ⌄ to select the number of days in the contract for the employee. • *000 TRS - Non contract* • *187 Valid basic days in contract* • *202 Valid basic days in contract* • *207 Valid basic days in contract* • *220 Valid basic days in contract* • *226 Valid basic days in contract* **Note**: Classroom teachers, full-time librarians, full-time counselors, and full-time registered nurses are always set to *187 - Valid basic days in contract*, regardless of the actual days in the contract.
Base Annual	This field is display only. The field is calculated based on the salary concept associated with the job and pay grade, step, schedule, and maximum days when entered.
Daily Rate	Type the gross amount of pay due the employee on a per-day basis. The rate is computed by dividing the base annual pay by the number of days employed. If you selected to automatically compute the daily rate in District HR Options, the field is display only and the system computes the value.
Contract Total	The amount from the **Total** field is displayed. The contract total = daily rate (salary schedule) x **# of Days Empld**. This field is used for the employee's annual salary amount and is reported to TEA.
# of Days Empld	The number of days employed is calculated based on the contract begin and end dates. The **# of Days Empld** hyperlink recalculates the number of days based on the calendar. If the calendar code is blank, the hyperlink is not available and the field is enabled for changes.

# Days Off	Type the number of days that the employee is eligible to take off. This information is used for Position Management.
Vacant Job	Select if the job is currently not filled. This option is only enabled when using Position Management.
Pay Rate	Type the gross amount of pay due to the employee per pay period. The rate is computed by dividing the contract amount by the number of annual payments. If you selected to automatically compute the pay rate in District HR Options, this field is display only, and the system computes the value. This field is required if the **Pay Type** field is set to 3 (hourly employee).
# Annual Pymts	The value from the **# of Annual Pymts** field is displayed.
Payoff Date	Type the date on which the employee's contract is paid off in the MMDDYYYY format. When this date and the pay date match, contract payoff occurs.

❏ Click **Calculate** to display the Employee Salary Calculation pop-up window.

❏ Under **Type of Calculation**:

❏ Select **Salary** to run the regular salary calculation or select **State Minimum Only** to only run the state minimum calculation.

Apply Percent of Day Employed to Salary Amount	Select to calculate the salary for either the **Salary** or the **State Minimum Only** option based on the percentage of day employed.

❏ Click **Execute** to start the recalculation process or **Cancel** to close the page without recalculating.

The **State Step** is needed for a contract employee unless they are retired from TRS. The **Position Code** and **% Assigned** are used to calculate the **State Min Salary**.

Notes:

The **Calculate** button only calculates the selected job. If the employee has multiple jobs, each job needs to be selected and calculated.

The **Calculate** button only calculates a salary if a salary scale is built in the tables and all applicable fields are completed. For example, G-type extra duties are not tied to a salary table; therefore, cannot be added to the contract total.

If **Use PMIS** is selected on the District Administration > Options > Position Management page, the **Calculate** button is disabled.

CAUTION: When calculating a midpoint salary, if the LEA has selected the **Amount** option in the **Distributions Built by Amt or %** field of the HR Options table, the system requires that a distribution amount be greater than zero and is not saved until an amount is entered for a new employee or an employee with a salary change. Since the system is not saved with zero amounts the user has to enter an amount manually. When a manual amount is entered into the distribution amount and contract balance and the user clicks **Calculate**, the amounts are not changed or updated. Since midpoint has no steps, the assumption is that the employee remains at that salary level without regard to whether the employee is within the minimum or maximum ranges.

When calculating a midpoint salary, if the district has selected the Percentage option in the **Distributions Built by Amt or %** field of the HR Options table, the program saves zero as an amount in distribution and contract balance allowing the percent to equal 100%. When saved without a distribution amount and a contract amount, and the user clicks **Calculate**, the system populates these fields automatically with amounts from the Midpoint salary table.

Midpoint calculation examples

Wkly Hrs Sched	Required TRS reporting field. Type the employee's scheduled weekly hours for a specific job where applicable.
Reg Hrs Worked	This field is for employees with hourly jobs (i.e., pay type 3). When the pay type is 3, type the regular hours the employee works. When the pay type is not 3, the field displays 0. If the field is completed and payroll is processed, standard gross pay is calculated based on these hours. If hours are entered in the **Reg Hrs** field in Hours/Pay Transmittals, the field is not used for the calculation of pay.
OVTM Elig	Select if the employee is eligible for overtime pay. If the field is selected, the **OVTM Rate** field becomes enabled, and the employee can be accessed in the Create Hours and/or Ovtm Hrs tab on the Hours/Pay Transmittals page.
OVTM Rate	Type the rate at which the employee is paid for any hours worked in excess of the number of regular hours. The field is used as the default when the employee is selected in the Create Hours and/or Ovtm Hrs tab on the Hours/Pay Transmittals page and can be modified if necessary. This field must be manually updated. It is not recalculated when salaries are calculated on the new pay step.
Hrly Rate	Type the hourly rate of pay for pay type 2 employees only. The field is disabled for any other Pay Type.
Exempt Status	Select if the employee is exempt from overtime pay. The field relates to whether or not the employee is considered eligible for overtime pay.
EEOC	Click to select the two-digit code indicating any applicable Equal Employment Opportunity Commission data.

❏ Under **State Info**:

The Personnel > Tables > Salaries > State Minimum tab must be completed in order to populate state minimum calculations.

State Step	Type the state step that the employee has earned based on years of service. State step does not include Career Ladder. ASCENDER does not support Career Ladder as it is no longer required.
Yrs in Career Ladder	Type the code identifying the current career ladder level for an employee. The field can be a single digit.
TRS Year	Select to indicate those employees whose contract year begins in July or August (nonstandard) and who receive a contract payment before the beginning of the school year. If **TRS Year** is selected, the payroll calculation program determines if a new school year record should be created when updating the **Nbr Days Earned** field, and accrual amounts for those July and August employees. **Example**: An employee accrues and has a 12-month contract with the first payment in July; therefore, the actual salary and benefit amounts update the current school year, and the **Nbr Days Earned**, accrual salary, and benefits update the new school year. When the next school year begins, the amounts accrued are available for use during the next school year. **Notes**: The beginning of the school year is determined by when the majority of the employees are paid, which is normally September. Do not select **TRS Year** if the employee accrues and the contract begins during any month other than July and August. Otherwise, an incorrect school year is created, which affects the accrued salary and benefits. If the employee does not accrue, **TRS Year** does not have an adverse effect on the creation of a school year record.
TRS Member Pos	Required TRS reporting field. Click ⌄ to select the code indicating the employee's classification. This field is required for All employees. • *01 - Professional staff* • *02 - Teacher, librarian* • *03 - Support staff* • *04 - Bus driver* • *05 - FT nurse/Counselor* • *06 - Peace Officers* • *07 - Food service worker* • *09 - Summer School* **Notes**: A value must be selected in the **TRS Member Pos** field and the contract begin date must be less than or equal to the current month when extracting the Contract and Position (ED40) report for the first time (i.e., **First Time Report ED40** is selected.) The **TRS Member Pos** field must be set to 01, 02, or 05 if the value in the **State Min Salary** field is greater than zero.

Wholly Sep Amt	Type the total annual salary that is not subject to the State Base. This field should only be used if part of the contract total includes a wholly separate amount. **Example**: An employee’s primary job is a teacher and his extra duty job is a bus driver. Since the bus driver salary is not subject to the State Base, **it is recommended** to set up the bus driver duty as a separate job or as an extra duty without **Expense 373** selected. In this case, a wholly separate amount does not need to be entered as it is already excluded. However, if the employee’s teacher and bus driver salary is lumped together in the contract total, the bus driver salary (extra duty compensation) is not subject to the Stat Min because it is wholly separate from his main duties; therefore, the annual bus driver salary amount should be indicated in the **Wholly Sep Amt** field. This field is used in computing the monthly amounts not subject to above state base salary calculations (TRS 373). The wholly separate amount reduces TRS gross wages for TRS 373 calculations.
State Min Salary	The salary is computed by multiplying the foundation daily rate by the percent assigned times the number of days in the contract. The value is automatically computed when an employee record is selected, but may be overwritten.
Foundation Daily Rate	This field displays the rate from the State Minimum Salaries table.
% Assigned	Enter up to 100% assigned.
# of Days Emplyd	This field displays a value based on the following: If the **TRS Member Pos** field is 01, the **# of Days** field is populated with the **# of Days Empld**. If the **TRS Member Pos** field is 02 or 05 and the **# of Days Empld** field is greater than or equal to the **# of Days in Contract** field, the **# of Days** field is populated with the **# of Days** in Contract. If the **TRS Member Pos** field is 02 or 05 and the **# of Days Empld** field is less than the **# of Days in Contract** field, the **# of Days** field is populated with the **# of Days Empld**. If the **TRS Member Pos** field is 02 or 05, the **# of Days in Contract** field is 187, and the **# of Days Empld** field is changed to less than 187, the user is prompted to recalculate the state minimum salary. Click **Yes** to recalculate the state minimum salary, or click **No** to retain the original salary. If the **TRS Member Pos** field is 03 or 04, the **# of Days** field is populated with zero.

Retiree Exception	Click to select the applicable retiree exception code. This field is used along with the **Employment Type** and **Take Retiree Surcharge** fields to determine whether or not to calculate a retiree surcharge for an employee. A value cannot be saved if the employee's **TRS Status** is set to *1 Eligible* on the Pay Info tab. This field is disabled for XTRA jobs. • *E Surge Personnel* • *B Non-Profit Tutor Substitute* • *N Non-Profit Tutor Half Time or Less* • *T Non-Profit Tutor Full Time* See Calculating Retiree Surcharge for additional information.

❑ Under **Calendar/Local Info**:

Calendar Cd	Type the calendar code, or click to select the two-digit code identifying the calendar for the employee. The calendar indicates the dates of the employee's work days and holidays. This field relates to the School Calendar table built with the holidays, in-service days, and work days for various LEA employees.
Begin Date	Required TRS reporting field. This field is automatically populated based on the selected calendar. If a calendar is not selected, type the beginning date for the calendar in the MMDDYYYY format. This field is required for all pay types.
End Date	Required TRS reporting field. This field is automatically populated based on the selected calendar. If a calendar is not selected, type the ending date for the calendar in the MMDDYYYY format. This field is required for all pay types.
# of Days Empld	PEIMS Reporting Element Type the actual number of at-work days within the school year the employee is scheduled to work in the LEA for the selected calendar. This number does not include holidays, weekends, and any other days the employee is not scheduled to work. If an employee does not work the same amount of days as shown on the contract (e.g., the person does not begin work at the start of the school year), the actual number of days the employee will work must be reported. If a workday calendar is set up on Tables > Workday Calendars, the field is set according to the selected calendar. If a calendar is not set up, the field is determined by the **Begin Date** and **End Date** fields on the Job Info tab, or can be manually entered.

Exclude Days for TEA	Select to exclude the number of days employed (for the selected job) from TEA reporting. For example, this field would be used for an employee who performs two separate jobs on the same day. **Example**: If an employee's primary job is as a teacher but they also assist in driving a bus, the bus driving job is an additional and separate job. Because it is a separate job and the days have been reported to TRS from the teaching record, the **Exclude Days for TEA** checkbox can be selected for the bus driving job.
Years Job Exp	Type the number of years of job experience the employee has for the selected job. The field can be a maximum of two digits. This is a local-use field.
Local Contract Days	Type the number of days an employee is required to work in the selected job in order to meet district contract requirements. The field can be a maximum of three digits, is user-defined, is not used in calculations, and can be updated on the Utilities > Mass Update page. This field is displayed on the HRS1650 - Employee Salary Information and User Created reports. This is a local-use field.

❑ Under **Worker's Comp Info**:

WC Code	Click ⌄ to select the type of workers' compensation for the employee. The WC code is used to calculate the workers' compensation premiums for all types of district employee records. The workers' compensation codes and descriptions are user defined and can be changed to local preference. These codes are located in the Workers' Compensation Code table and must exist before a code can be selected from this field.

Note: If the workers' compensation code is changed, the code is also changed for the distribution records associated to the job. If the distribution records are types B, T, or G with extra duty codes, the distribution WC code is only changed if the original workers' compensation codes in the job record and the distribution records matched before the job record was changed.

Calculating Workers' Compensation

WC Ann Pymts	Type the number of annual workers' compensation payments for the contract period.
WC Remain	Type the number of remaining workers' compensation payments to be made during the contract period.

Note: The number of months in the contract should correlate with the number of workers' compensation payments. For example, if the employee has a 10-month contract, then the employee will have ten workers' compensation payments and ten workers' compensation remaining payments at the beginning of the school year. The **WC Remain** field is decreased by one with each regular processed payroll until it is zero. Workers' Compensation is only calculated during the months in which the employee is actually working. The above two fields and the **Workers' Compensation Code** field are required for expensing to occur when a payroll is processed.

❑ Under **Accrual Info**:

Code	Click ⌄ to select the one-character, LEA-defined code required if the LEA is using the accrual pay special option. The code must match a code used to identify a calendar on the Accrual Calendar tab. If an accrual code is entered, it applies to the current job. Each job can have a different number of days earned per processed pay date; therefore, can be assigned a different accrual code.
Accrual Rate	Type the rate which is the annual contract amount divided by the number of days employed. If you selected to compute the accrual rate automatically in District HR Options, the field is display only, and the system computes the value.
Total	Displays the amount from the **Contract Info Total** field.
# of Days Empld	PEIMS Reporting Element Displays the value from the **Calendar Info # of Days Empld** field.

Note: A distribution must be added on the Distributions tab prior to clicking **Save**.

❑ Click **Save**.

Distributions

Payroll > Maintenance > Staff Job/Pay Data > Distributions

This tab links budget codes, pay amounts (and percentages), and grant codes to activity codes, which indicate specific job responsibilities. The tab serves to identify the specific sources of the funds used to cover an employee's total salary. The tab also shows how the employee's salary is distributed. Before using this tab, ensure that each employee has a demographic record as created using the Maintenance > Staff Demo > Demographic Information tab.

Sample Staff Job/Pay Data Images by Pay Type (prints separately)

Complete the necessary distribution information fields.

❑ Click **+Add** to add a row.

Field	**Description**
Job Code	Click ⌄ to select the four-digit job code to which the employee is assigned. The job code list is generated by the jobs on the Job Info tab. **Note**: All distributions for a particular job code and account type are totaled together. Any new type G distributions are totaled with the regular type G distributions. The total contract amount is applied to these distributions.

Field	Description
Extra Duty Code	Click to select the two-digit code of the additional job assignment. The drop down can include type G and type S extra duty codes. If the employee does not have any extra duties entered on the Pay Info tab, no codes are displayed. **Notes**: The type G extra duty code can be split between account codes. The extra duty job code cannot be split between job codes. It can only exist with one job code. The type S extra duty code can only have an XTRA job code.
Account Type	Click to select the one-digit code of the account type for that job. Account Type B (Non-TRS taxable business allow) is used when the Tax column has been completed under Business Allowance on the Pay Info tab. Account Type G (Standard gross pay) represents the contract amount from the Job Info tab. Account Type T (Non-TRS non-taxable business allow) is used when the Non Tax column has been completed under Business Allowance on the Pay Info tab. Account Type X (TRS 373 distr contrib) is used when the above state base expense is to be posted to an account other than the one chosen for the type G account. **Note**: All distributions for a particular job code and account type are totaled together. Any new type G distributions are totaled with the regular type G distributions.
Account Code	Type the account code, or click to select the code which identifies the account from which funds are expended for the activity code. For extra duty accounts, the **Account Code** field is populated from the extra duty code table. Only expenditure accounts with object code 6XXX are allowed. **Note**: When the user is logged on to the current payroll files, the account code validation occurs against the Finance Chart of Accounts. If the user is logged on to the next year payroll files, the account code must exist in the Budget > Maintenance > Budget Data tables.
Description	Displays the description associated with the account code from the Finance chart of accounts.

Field	Description
Amount	Type the dollar value to be expended from the budget code. Type all or part of the contract total from the Job Info tab. If the **Distributions Built By Amt or %** field on the District HR Options page is set to *Percentage*, then only the **Percentage** field is enabled for use. For a salaried (pay type 1 or 2) employee, the data in this field is used to calculate the percent amount. **Notes**: For extra duty accounts, the maximum amount that can be entered must match the amount that the extra duty codes have defined on the Pay Info tab. This applies even if the amounts are distributed among several accounts. Even if the distributions are entered by percent, the amount is always entered for these distributions.
Percent	Type what percentage of the total pay rate is represented by the amount indicated. The percentage is the portion of contract total from the Job Info tab. If the **Distributions Built By Amt or %** field on the District HR Options page is set to *Amount*, then only the **Amount** field is enabled for use. This field is calculated by the system for salaried (pay type codes 1 and 2) employees. For hourly (pay type 3) employees, the user enters data into this field. For each job that is not XTRA, the account type percent total must equal 100% (e.g., if an employee has a job that is not XTRA, the type G percents for that job must total 100%, the type B percents for that job must total 100%, and the type T percents for that job must total 100%). For each job that is XTRA, the account percents for each extra duty code must total 100%.
Activity Code	Click to select the two-digit code identifying the activity for which the employee is receiving pay according to the budget code and amount indicated. This is a required TEA PEIMS Pay Activity code. (78 Non-Salary is for $0 pay). For extra duty accounts, the **Activity Code** field is populated from the Personnel > Tables > Salaries > Extra Duty tab.
TRS Grant Code	This field is populated automatically for active employees based on the grant code associated with the fund as defined on the Tables > Salaries > Fund to Grant tab.
Worker's Comp Code	Click to select the workers' compensation code (e.g., A, B), or leave blank if the distribution is not subject to workers' compensation taxes. This field is only enabled if the **Extra Duty Code** field is populated.

Field	Description
Expense 373	Click ⌄ to select if the account should be used in the ASB distribution for TRS. If N (*Account not used in ASB distribution*) is selected, it is not used for distribution of the above state base amount on the TRS 373 Report. For extra duty accounts, the **Expense 373** field is populated from the Extra Duty Job Code table. **Notes**: For type S distributions, if Y (*Account used in ASB distribution*) is selected, it is included in the **Gross** field on the Maintenance > TRS YTD Data page under TRS Deposit Information and is not included in the **Suppl Salary** field. It is included in the calculation and distribution in the adjusted TRS salary on the TRS 373 Report (HRS4000). If N (Account not used in ASB distribution), it is included in the **Gross** and **Suppl Salary** fields on the Maintenance > TRS YTD Data page under TRS Deposit Information; however, it is not included in the adjusted TRS salary on the TRS 373 Report or on the distribution report. For type S extra duty jobs, if N (Account not used in ASB distribution), the amounts are not included in the calculation or distribution in the adjusted TRS salary on the TRS 373 Report.
Employer Contribution	Select if the distribution should be included as an employer insurance contribution. The field is only available when account type G is selected. This is used to expense employee benefits such as the employer insurance contribution.
Performance Pay	Select if the amount to be paid for this account should be included in the TRS deposits performance pay calculations. The field is only available for account types G or S. This is for TRS Certified (TRS 596) performance compensation.

❏ Click **Re-sort**. The records on the tab are sorted by job code, account type, and extra duty code.

❏ Click **Refresh Totals** to update the totals if new percentages or amounts are added.

❏ Click **Save**.

Deductions

Payroll > Maintenance > Staff Job/Pay Data > Deductions

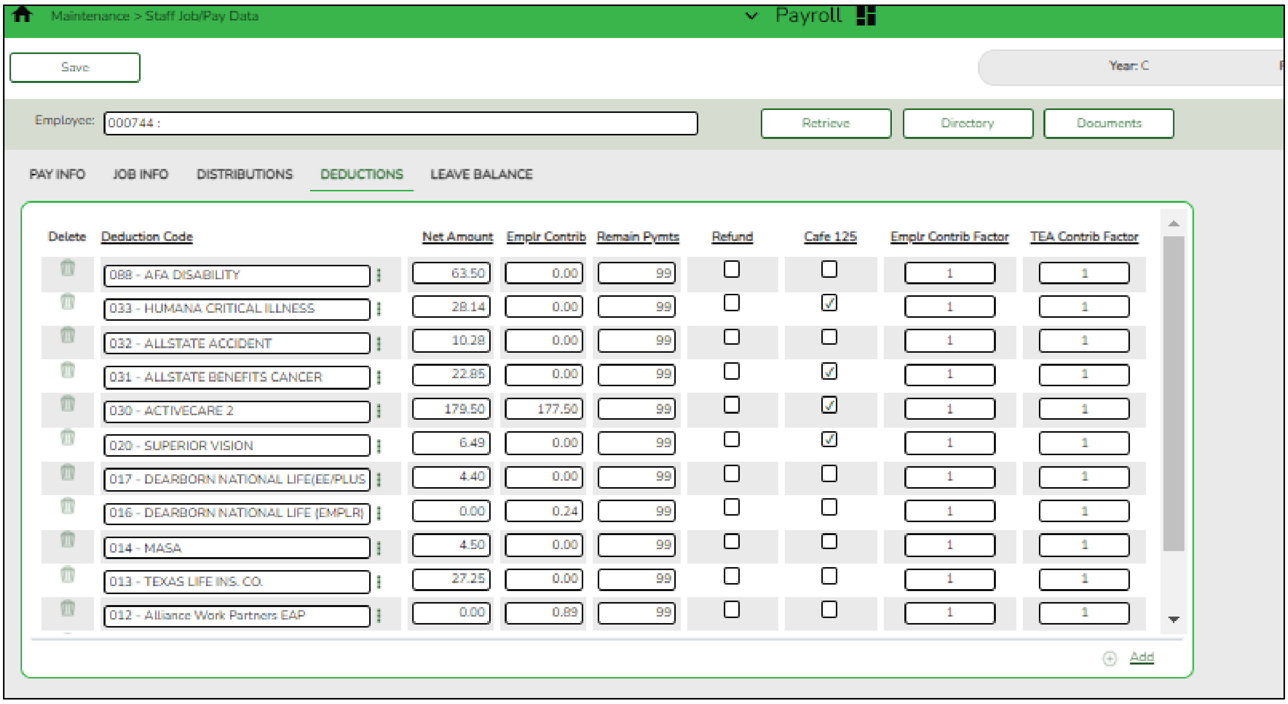
This tab is used to identify specific deductions that apply to an employee's pay. Deduction data includes the deduction code/description, the net amount to be deducted, an indication of a cafeteria-125 deduction, the number of remaining payments, and the employer's contribution.

Reminder: Be sure to verify the accuracy of deduction information for returning employees.

Predefined abbreviated deduction codes

Predefined Abbreviated Deduction Codes

Abbreviated Code	Description	Object Code	W-2 Box	W-2 Code
A3	403b FICA Annuity (FICA Alternative)	2159		
AC	TRS Health Insurance	2153	12 14	DD HEALTH
AN	Annuities	2159	12	E
CU	Credit union	2154		
D1	457 deferred comp	2159	12	G
D2	457 deferred comp lump amount	2159	12	G
DC	Dependent child care	2159	10	
HI	Health insurance	2153	14	HEALTH
HS	Health savings account	2159	12	W
IR	Income replacement	2159		
LI	Life insurance	2153		
M1	Miscellaneous 1	2159		
M2	Miscellaneous 2	2159		
M3	Miscellaneous 3	2159		
R1	Roth 403b Annuities	2159	12	BB
R2	Roth 457b Annuities	2159	12	EE
RI	Retiree TRS-Care surcharge	2155		
SB	Savings bond	2159		
TC	Emplr contrib to whole life ins	2153	12	C
TI	Emplr contrib group ins over $50,000	2153		
TR	TRS service buy back	2159		
TS	TSTA dues	2159		
UD	Union dues	2159		
UF	United fund	2159		
WH	Additional withholding	2151	2	



Complete the necessary deduction information fields.

❑ Click **+Add** to add a row.

Field	Description
Deduction Code	Type a three-digit code identifying the deduction being recorded for an employee, or click to select one from the list. This code must exist in the Deduction Code table. **Notes**: Deduction code 001 should only be used for extra withholding. If a 457 deduction refund is necessary, the deduction code associated with the D2 type deduction should be used so that a flat amount can be refunded. If a D1 type deduction is used, the system does not use the amount entered but calculates the amount based on the salary being paid. If you do not have a D2 type deduction, navigate to the Tables > Tax/Deductions > Deduction Code tab to establish a D2 type deduction, and then select that type of deduction on the tab. When a deduction with a D1 abbreviation code (see Deduction Code table) is added to the employee’s master deduction record, the system calculates the amount to withhold based on the employee’s pay and the percentage in the 457 Deferred Compensation table. The amount is populated automatically in the **Net Amount** field in the employee’s master deduction record each time a payroll is processed for the employee. If the employee’s pay changes with each payroll processed, the net amount is also changed. When a deduction with a D2 abbreviation code (see Deduction Code table) is added to the employee’s master deduction record, the amount entered in the **Net Amount** field is the amount that the system deducts from the employee’s pay each time a payroll is processed. It is your responsibility to determine the net amount, and enter it into the employee’s master deduction record. The amount is not updated automatically if the employee’s pay changes and a payroll is processed. When a deduction with a DC (Dependent Care) abbreviation code is added to the employee's master deduction record, the **Cafe 125** field must be selected. When total dependent care (employee and/or employer) exceeds $5,000 for the calendar year, an additional deduction line is displayed on the check and on the reports to separate the taxable and nontaxable parts for that deduction. When a deduction with an AN abbreviation code (see Deduction Code table) is added to the employee's master deduction record, the **Cafe 125** field cannot be selected. When a deduction with an R2 abbreviation code (see Deduction Code table) is added to the employee's master deduction record, the **Cafe 125** field cannot be selected.
Net Amount	Type the amount to be deducted from the employee's gross pay per pay period to cover the cost of the deduction.
Emplr Contrib	Type the amount of the contribution (per pay period) by the district for the employee with that deduction.
Remain Pymts	Type the number of payments remaining to be made to the employee during the current contract period. Type 99 for an ongoing deduction.
Refund	Select if the employee is entitled to a refund.

Field	Description
Cafe 125	Select if the deduction indicated is part of a cafeteria plan. **Notes**: The following deduction codes cannot have the **Cafe 125** field selected: A3, AN, CU, D1, D2, R1, R2, RI, SB, TR, TS, UD, UF, and WH. The **Cafe 125** field must be selected in order for the Health Savings Account (HSA) and Flexible Spending Arrangement (FSA) deductions to be tax sheltered.
Emplr Contrib Factor	Type the number of times (if not one) the district's contribution(s) toward the deduction are to be applied during the current pay period. **Example**: An employee is not receiving a paycheck during the summer months, and the employer wants to expense June, July, and August employer contributions in the May paycheck. So you would enter a 4 here, and that number of additional employer contribution payments are expensed.
TEA Contrib Factor	Type the number of times (if not one) the TEA state health insurance contribution is to be applied during the current pay period. **Example**: An employee and spouse are eligible for and participating in the health insurance program, and only one of them receives the TEA state contributions for both in his/her paycheck. So you would enter a 2 in this field for the employee with Y in the **Health Insurance Eligible Flag** field, and that number of TEA contribution payments are expensed. The spouse with an S in the **Health Insurance Eligible Flag** field has a zero in the field. If the employee has multiple deduction records for the AC - TEA health insurance deduction type, the TEA contribution is applied to each AC - TEA health insurance deduction type based on the TEA Contribution Factor. If the AC - TEA health insurance deduction record is flagged as a refund, the TEA contribution amount is handled as a refund.

❏ Click **Save**. A message is displayed that asks if you would like to update deduction records to next year.

- Click **Yes** to copy the records to next year.
- Click **No** to continue without copying the record to next year.

Leave Balance

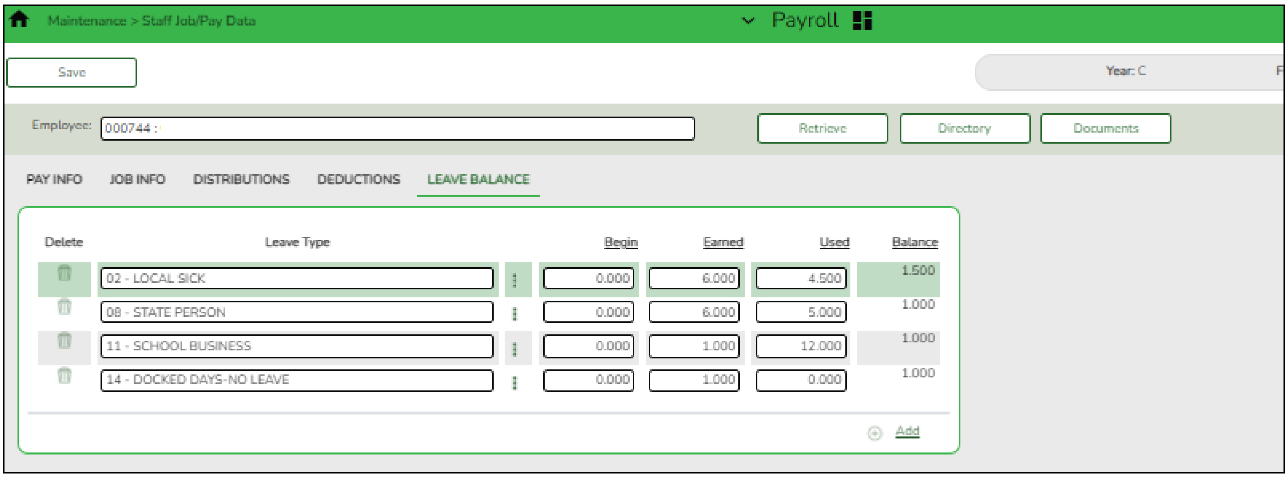
Payroll > Maintenance > Staff Job/Pay Data > Leave Balance

This tab is used to maintain the status of each type of leave which applies to a given employee. These categories include updated totals for leave earned and leave used, and a leave balance for the various kinds of leave, both state and local.

Leave information is maintained on the ***Payroll > Tables > Leave*** page and must be updated prior to using this tab.

Note: The tab is available for maintenance of the current year leave balance only. The tab is not accessible when in the next year frequency.

Reminder: Be sure to verify the accuracy of leave information for returning employees.



Complete the necessary leave balance fields.

❑ Click **+Add** to add a row.

Field	**Description**
Leave Type	Click ⋮ to select the two-digit code identifying the specific type of leave being recorded for the selected employee. The Leave Type - Status lookup sort order is by status and then leave code. **State Sick** and **State Personal** codes for service records are selected on the Payroll or Personnel > Tables > District HR Options page.
Begin	Type the amount of leave for the employee at the beginning of the current pay period.
Earned	Type the amount of leave earned by the employee as of the current pay period. The earned totals are updated by payroll transactions.
Used	Type the amount of leave used by the employee during the current year as of the current pay period. The used totals are updated by payroll transactions.
Balance	Displays the amount of leave still available for use by the employee as of the current pay period. The number displayed is calculated by the system based on the options selected for the leave type.

❑ Click **Save**.