



Extract ED20 Data

Table of Contents

| | |
|--------------------------------|----------|
| Extract ED20 Data | i |
| Extract ED20 Data | 1 |

Extract ED20 Data

This option is used to extract employee demographic information (employee number, name, address, date of birth, gender, and contact information) for all employees from the Maintenance > Staff Demo > Demographic Information tab to the Maintenance tab.

An ED20 record must be submitted for all new employees including employees who were previously terminated and rehired. This does not apply to retirees. The ED20 record is submitted to TRS at the beginning of a new school year and each month for new employees. The ED25 record is used to change previously submitted employee demographic information.

Click here to access the [TEAM Report Formatting Guide - ISDs, Charters, and ESCs](#) for additional reporting information and complete file record layouts.

Extract employee demographic data (ED20):

Under **Extract Option**, select one of the following options:

- **Insert new records.**
- **Delete all existing records and insert records.**

| Field | Description |
|-------------------------------|--|
| Frequency | Select the payroll frequencies (e.g., 4 (biweekly), 5 (semimonthly), 6 (monthly)) to be extracted for the report. |
| Report Date (MM-YYYY) | Type the reporting month and year for the report. If the month and year of this extract match the month and year in the TRS Begin Date field and the TRS Eligible Flag is equal to 1, the employee record is extracted. |
| First Time Report ED20 | Employees must have an active status in the CYR payroll. Employees are required to have either the Original Emp. Date or Latest Re-Employ Date populated on the Maintenance > Staff Job/Pay Data > Employment tab. The most recent value of either of these dates is used to determine if the employee should be included in the extract. If First Time Report ED20 is not selected, the most recent date value (Original Emp. Date or Latest Re-Employ Date) that is used must match the value entered in the Report Date (MM-YYYY) field. If First Time Report ED20 is selected, the most recent date value (Original Emp. Date or Latest Re-Employ Date) that is used must be equal to or less than the value entered in the Report Date (MM-YYYY) field. |


Click **Execute**. If there are no errors, a message is displayed indicating that the process was successful. If any errors are encountered during the export process, the Extract Employee

Demographic Data to ED20 Error report is displayed.


[Review the report.](#)

Review the report using the following buttons:


Click  to go to the first page of the report.


Click  to go back one page.

Click  to go forward one page.

Click  to go to the last page of the report.

The report can be viewed and saved in various file formats.

Click  to save and print the report in PDF format.

Click  to save and print the report in CSV format. (This option is not available for all reports.) When a report is exported to the CSV format, the report headers may not be included.

Click **X** to close the report window. Some reports may have a **Close Report**, **Exit**, or **Cancel** button instead.

Notes:

- If a Warning message is displayed, the data is extracted and you can address the issue(s) on the Utilities > TEAM Submission > Data Maintenance > Employee Data (ED) ED20 Maintenance tab.
- If a Failure message is displayed, the data is not extracted and you must resolve the issue(s) and extract the data again.