

districthroptions

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Human Resources > Tables > District HR Options

This page is used to select and set options for management of the LEA's payroll and employee functions and records. The selected options are used for all payroll frequencies (e.g., current and next year unless specifically designated).

Set district HR options:

Field	Description
TRS District ID	Type the four-digit district identification number.
Federal ID Number (EIN)	The federal ID number from the District Finance Options page in the Finance is displayed.
Payroll Clearing Fund/Year	This field is automatically populated with the payroll clearing fund/year selected on the Finance > Tables > District Finance Options > Clearing Fund Maintenance tab. If not, click ⌄ to select the fund/fiscal year (e.g., 163/9) for the current year to be used as the clearing fund/fiscal year when interfacing to Finance.
TWC District ID	Type the nine-digit identification number assigned by the Texas Workforce Commission.
Use Direct Deposit (Y, N, or E)	Click ⌄ to select whether to use direct deposit, not use direct deposit, or use electronic funds transfer.
TRS Cost Education Index	Type the value assigned to the district by TEA. This value is used for adjusting the state minimum salary for costs beyond the district control. This value can be found on the Summary of Finance report issued by TEA.
Distributions Built By Amt or %	Click ⌄ to select whether you want to create/edit employee salary distributions by amount and allow the percentages to be automatically calculated, or only enter the percentages and allow amounts to be automatically calculated.
Apply Leave Used or Earned First	Click ⌄ to select the sequence used to post employee leave transmittals and leave applied using the payroll control record. Posting leave used first to apply leave earned after applying leave used can result in docking an employee's pay during the current payroll period even if the employee has earned leave during the current payroll period. (The user needs to check the local leave policy.) Posting leave earned first causes the leave earned for the pay period to be added to the leave balance before the leave used for the pay period is deducted from the balance. It allows employees to use all available leave posted through the payroll calculations control record with docking occurring when the amount of leave used exceeds the total amount possible.
Leave Code for State Sick	Click ⌄ to select the two-digit code used to charge an employee's absence to state sick leave. State sick leave is leave earned and accumulated prior to 1997. Leave transmittals for this leave type may affect service record days employed.

Field	Description
Leave Code for State Personal	Click ⌄ to select the two-digit code used to charge an employee's absence to state personal leave. State personal leave is leave earned and accumulated by the employee since 1997. Leave transmittals for this leave type may affect service record days employed.
Update Actual Hours From Payroll Processing	Select to use actual hour data from the pay transmittals (during payroll processing) to update/insert records to the Actual Hours table that is used for TRS processing. This field is selected by default. **Example**: If actual hours are added to the employee's pay transmittal, then during the payroll processing, the Pre-Post Actual Hours Worked Report displays the actual hours worked from the pay transmittal. After running payroll, use the Human Resources > Maintenance > Actual Hours Worked page to verify that the actual hours worked data was updated for each applicable employee. If not selected, you must either use the Human Resources > Utilities > Import Actual Hours Worked page to import the actual hours from a file or manually enter the data on the Human Resources > Maintenance > Actual Hours Worked page.
Calculate Accrual Salaries	Select to have the system calculate accrued salaries. If the field is not selected, salaries are not accrued.
Check Amount - Alpha	Select to spell the check amount on all payroll checks. If the field is not selected, the system uses a numerical value for the check amount on all payroll checks.
Summarize Benefits Interface	Select to display benefits in a summary format. If not selected, the benefits are displayed in a detail format. If selected, the benefit accounts are collapsed to a zero subobject and the last three digits of the code (e.g., 199-11-6119-01-001-311423 benefit accounts are collapsed to 199-11-6119-00-001-311000).
Supplemental Tax Rate	Type the percent to apply for supplemental income.
Standard Hours per Workday	Type the standard number of hours the district requires that hourly employees work.
Max Gross Amt for District	Type the amount of the largest gross employee paycheck for the district. A failure message is issued when a paycheck over this amount is attempted to be processed. If the check amount is correct, reset this field by entering a larger value and recalculate to continue processing payroll. If the check amount is incorrect, correct the check amount and recalculate to continue processing payroll.
Auto Assign Employee Number	Select to have the system assign new employee numbers automatically. If the field is not selected, the user must enter the new employee numbers manually.

Field	Description
Next Available Employee Number	The number displayed is the last number used plus 1. Click **Next Available Employee Number**. The system displays the next available employee number. If the **Auto Assign Employee Number** field is not selected, the **Employee Number** field is active. Select the field to highlight it and type a new next number for manual employee number assignment. **Note**: If the employee number has reached the maximum number (e.g., 999999), the system goes back to 000001 and begins to search for the next available number that was not previously used (e.g., 000995). If all available numbers were previously used, the system displays the message: "All available employee numbers are used." Users must take the actions necessary to clear old or inactive employee numbers from this file ID.
School Year for PEIMS Codes	Type the school year for the PEIMS edit tables in the YYYY format. **Note**: If the **School Year for PEIMS Codes** field does not contain a valid value or if left blank, values are not displayed in the **PEIMS** drop-down fields (e.g., **Sex**, **Ethnicity**, etc.) on the Personnel > Maintenance > Staff Demo > Demographic Information page.
Use Emp Nbr or SSN in EFT File	Click ⌄ to select whether the employee number or the social security number should be included in the EFT file. By default, the field is set to *E - Employee Nbr*.
Set Demo Alpha Fields to Uppercase	Select to set the employee's **Legal** and **Former Name** (**First**, **Middle**, **Last**, and **Maiden**) and **Address** fields to uppercase when a new employee demographic record is created or an existing record is updated on the Human Resources > Maintenance > Staff Demo > Demographic Information tab.

❑ Under **Automatically Compute**, select whether to automatically compute the **Pay Rate**, **Daily Rate**, **Dock Rate**, **Accrual Rate**, or **Overtime Rate**. This function relates to the pay fields at the bottom of the Job Info page and affects the current year and next year calculations. These fields are not referenced by the system when performing automatic salary calculations through Mass Update in Utilities.

Note: If **Use PMIS** is selected on the District Administration > Options > PMIS District Options page, all of the check boxes under **Automatically Compute** are cleared and disabled.

Under **Default Overtime Object Code**, click ⌄ to select the object codes for **Professional**, **Para-Professional/Hourly**, or **Other** overtime fund account options. These objects override object codes in the employee distribution record when overtime hours transmittals are submitted.

❑ Under **TEA Health Ins Contribution**:

Amount	Type the amount of the TEA state health insurance contribution (e.g., 75.00). **Note**: For an employee to be eligible for the TEA health insurance contribution, the employee must have a Y in the **Health Insurance Code** field on the Pay Info tab in Maintenance, must be eligible for TRS (TRS Status Code must be set to 1 in the **TRS Eligible** field on the Pay Info tab), and have a Deduction Code with the abbreviated code of AC. Also, the AC deduction must have a remaining payment greater than zero. The AC abbreviation is located on the Payroll > Tables > Tax/Deductions > Deduction Code tab.
Obj	Click ⌄ to select the object code of the account number for the amount to be expensed in the Finance system.
Sobj	Click ⌄ to select the subobject code of the account number for the amount to be expensed in the Finance system. **Note**: If the district does not use one of the pay frequencies, access to these fields is not allowed. If the user does not have security access to a pay frequency, access to these fields is not allowed.

Under **First Pay Date of School Year**:

Payroll 4, Payroll 5, and Payroll 6	Type the first pay date for each of the three pay frequency fields in the MM-DD-YYYY format. Once the pay date is entered, it should not be changed until the next school year. The date entered here should be representative of a payroll that will actually be processed, whether supplemental or regular. If a date is entered and no payroll is actually posted using that date, the system will have difficulty identifying when the new school year began. This could affect how data is handled in the new school year.

Additional first pay date notes

Fiscal Year versus School Year

- If your fiscal year is July through June and 10-month employees are paid from September through August, this date should be September.
- If your fiscal year is July through June and all employees (including 10-month employees) are paid from August through July, those employees should all have **TRS Year** selected on the Payroll > Maintenance > Staff Job/Pay Data > Job Info tab.
    - If the **First Pay Date of School Year** field has an August date, a new school YTD is created and updated with all pay and accrual amounts. The TRS YTD is updated in the old school year. For example, if the first pay date of the school year is August 25, 2026, pay and accruals are updated in the 2027 school YTD and the 2026 TRS YTD is updated.
      Note: If the **First Pay Date of School Year** field is set to a date prior to September, be sure to verify that your TRS rates correspond to the appropriate TRS reporting month.
    - If the **First Pay Date of School Year** field is updated with a September date, the school YTD and TRS YTD are updated in the current school year and if accruing, a new school YTD is created and updated with those amounts. For example, if the first pay date of the school year is September 25, 2026, pay and TRS amounts are updated in the 2027 school YTD and the 2027 TRS YTD. If the employee accrues, a 2027 school YTD is also created.
- If your fiscal year is September through August and the 10-month employees are paid from September through August, this date should be September.
- If end-of-year payroll accruals are performed for August days worked and the first paycheck is in September, the first pay date should be September.
- All non-standard employees (those employees who receive their first check in July or August) should have **TRS Year** selected on the Payroll > Maintenance > Staff Job/Pay Data > Job Info tab.

This first pay date of the school year is used to determine:

- The school year to be used for the school YTD records for regular and non-standard employees. If the employee is a non-standard employee (**TRS Year** is selected), and the contract begin date is greater than this date, then the payroll calculation stores the accrual amounts in the next year school YTD record.
- The school year that should be used for the TRS rates and employee TRS record.
- The pay history records that should be used for accruals.
- The leave transmittals that should be accumulated to determine if the leave duration has been met for the school year.

Notes:

If the LEA does not use one of the pay frequencies, access to that field is not allowed. If a user does not have security access to a pay frequency, access to that field is not allowed.

When the first pay date of the school year is changed, if any message displayed includes information about contacting your regional consultant, there are processed pay dates where amounts need to be moved from one school year to another. If these amounts are not moved, it can adversely affect school YTD historical amounts, TRS historical amounts, and reporting, workers' compensation historical amounts and reporting, and payroll accrual calculations. **Do not** proceed without addressing this issue.

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Under **TRS Extract Options**:

Note: The ER20 always extracts the actual hours for retired employees.

Use Pay Dates for TRS Month or Actual Date	This field applies to the RP20 and ER20 extracts. Select *A - Actual Hours Table Date* to use the actual date from the Maintenance > Actual Hours Worked page to determine the accumulated actual hours worked for pay type 3 employees. And, determine the days worked for pay type 4 jobs (i.e., substitutes). The actual date, month and year, must be the same as the TRS reporting month and year. The RP20 and ER20 extracts include all actual hours worked table entries regardless if the associated pay date is processed or unprocessed. The TRS month associated with the pay date is ignored. Select *P - Pay Dates for TRS Month* to use the pay date from the pay dates table to determine the accumulated actual hours for a pay type 3 job. And, determine the days worked for pay type 4 jobs (i.e., substitutes). The associated pay date must be a processed pay date that has the same month and year as the TRS reporting month and year. The actual date is ignored.

Pay Type 1 - Report Actual or Scheduled Hours	This field applies to the RP20 extract. Select *A - Actual Hours* to report actual hours worked for a pay type 1 job. Review the **Use Pay Dates for TRS Month or Actual Date** field selection to determine how the records are selected from the actual hours worked table. Select *S - Scheduled Hours* to report scheduled hours worked for a pay type 1 job. If *S - Scheduled Hours* is selected, then the hours are reported based on the assigned calendar. The TRS workday calendar is used for employees who do not have an assigned calendar.
Pay Type 2 - Report Actual or Scheduled Hours	This field applies to the RP20 extract. Select *A - Actual Hours* to report actual hours worked for a pay type 2 job. Review the **Use Pay Dates for TRS Month or Actual Date** field selection to determine how the records are selected from the actual hours worked table. Select *S - Scheduled Hours* to report scheduled hours worked for a pay type 2 job. If *S - Scheduled Hours* is selected, then the hours are reported based on the assigned calendar. The TRS workday calendar is used for employees who do not have an assigned calendar.
Pay Type 3 - Report Actual or Scheduled Hours	This field applies to the RP20 extract. Select *A - Actual Hours* to report actual hours worked for a pay type 3 job. Review the **Use Pay Dates for TRS Month or Actual Date** field selection to determine how the records are selected from the actual hours worked table. Select *S - Scheduled Hours* to report scheduled hours worked for a pay type 3 job. If *S - Scheduled Hours* is selected, then the hours are reported based on the assigned calendar. The TRS workday calendar is used for employees who do not have an assigned calendar.

Click **Save**.

Other functions and features:

Retrieve	Retrieve data. The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.

Print	Print the District Human Resources Options report. **Review the report using the following buttons**: Click First to go to the first page of the report. Click to go back one page. Click to go forward one page. Click Last 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.