



Personnel: Maintenance

Table of Contents

| | |
|--|----|
| Personnel: Maintenance | i |
| Maintenance | 1 |
| ACA 1094 YTD Data | 2 |
| 1094-C - HRS3880 | 3 |
| 1094-C Hist - HRS3880 | 7 |
| ACA 1095 YTD Data | 8 |
| 1095-B - HRS3880 | 9 |
| 1095-B Hist - HRS3880 | 11 |
| 1095-C - HRS3880 | 12 |
| 1095-C Hist - HRS3880 | 16 |
| Employment Info - HRS3100 | 17 |
| Employment Info - HRS3100 | 24 |
| Health Insurance Status - HRS3860 | 25 |
| Health Insurance Status - HRS3860 | 26 |
| Staff Demo | 27 |
| Credentials - HRS3000 | 28 |
| Demographic Information - HRS3000 | 31 |
| Insurance - HRS3000 | 38 |
| Responsibility - HRS3000 | 40 |
| Service Record - HRS3000 | 45 |
| Verification - HRS3000 | 47 |
| Summer School Contracts | 48 |

Maintenance

Use the Table of Contents to access a page.

ACA 1094 YTD Data

Use the Table of Contents to access a page.

1094-C - HRS3880

Personnel > Maintenance > ACA 1095 YTD Data > 1094-C

This page is used to report summary information for each Applicable Large Employers (ALE) member information data for Form 1094-C (Transmittal of Employer-Provided Health Insurance Offer and Coverage Information Returns) reporting purposes. The Form 1094-C must be filed when an employer files one or more Forms 1095-C. Additionally, the 1094-C is used to determine whether an employer owes a payment under the employer shared responsibility provisions under section 4980H.

For specific information about Form 1094-C, click [here](#) and refer to the Instructions for Form 1094-C.

The page consists of the following three tabs:

- ALE Member Information
- ALE Member Information - Monthly
- Other ALE Members of Aggregated ALE Group

Enter 1094-C data:

| ALE Member Information tab | Field | Description |
|---|----------------------|---|
| | Calendar Year | Populated with the current calendar year; however, you can enter a different year. The year must be greater than or equal to 2015. |
| Click Retrieve to retrieve the employer's record. | | |
| Is this the authoritative transmittal for this ALE Member? | | Select to designate the Form 1094-C transmittal as the authoritative transmittal that reports the employer's aggregate employer-level data. Note: Only one authoritative transmittal should be filed for each employer. |
| Under ALE Member Information , select the applicable fields: | | |
| Total number of Forms 1095-C filed by and/or on behalf of ALE Member | | Type the employer's total number of filed Forms 1095-C. You can run verify the number of records by running the Reports > HR Reports > Payroll Information Reports > HRS6720 - ACA 1095 YTD Report. |
| Member of an Aggregated ALE Group | | Select if the employer was a member of an Aggregated ALE Group during any month during the calendar year. |
| Under Certifications of Eligibility , select all of the applicable codes: | | |
| A. Qualifying Offer Method | | |
| B. Qualifying Offer Method Transition Relief - Form revision per 2016 IRS guidelines, effective for the 2016 tax year: B. Reserved and disabled (default is N for the 2016 tax year). | | |
| C. Section 4980H Transition Relief - Form revision per 2017 IRS guidelines, effective for the 2017 tax year: C. Reserved | | |
| D. 98% Offer Method | | |
| Note: If C is selected, the Section 4980H Transition Relief Indicator column is enabled on the ALE Member Information - Monthly tab. | | |

| ALE Member Information - Monthly tab | Column | Description |
|---|---|---|
| | Minimum Essential Coverage Offer Indicator | <p>In the All 12 months field:</p> <p>Select Yes if the employer offered the minimum essential coverage to at least 95% of its full-time employees and their dependents for the entire calendar year, or if the employer did not offer the minimum essential coverage to at least 95% of its full-time employees and their dependents but is eligible for certain transition relief.</p> <p>Select No if the employer did not offer the minimum essential coverage for all months in the calendar year.</p> <p>If the employer offered the minimum essential coverage only in certain calendar months, select Yes or No for the applicable months.</p> |
| | Full-Time Employee Count for ALE Member | <p>Type the number of full-time employees for each month, but do not count any employee in a Limited Non-Assessment Period.</p> <p>If the total number of employees was the same for every month of the calendar year enter that number in the All 12 Months field, or in each individual field. The All 12 months field is not automatically populated.</p> |
| | Total Employee Count for ALE member | Type the total number of employees for the ALE member either for All 12 months, or for each individual month. The All 12 months field is not automatically populated. |
| | Aggregated Group Indicator | <p>This column must be completed if Member of an Aggregated ALE Group is selected on the ALE Member Information tab.</p> <p>Select All 12 Months if the employer was a member of an Aggregated ALE Group for all 12 months of the calendar year.</p> <p>If the employer was a member of an Aggregated ALE Group for one or more months during the calendar year, select the applicable month (Jan - Dec) fields.</p> |
| Other ALE Members of Aggregated ALE Group | Section 4980 Transition Relief Indicator | <p>The Section 4980H Transition Relief Indicator column is only enabled if C is selected on the ALE Member Information tab.</p> <p>Type one of the following relief codes based on the employer's certification of eligibility.</p> <p>A - If the employer is eligible for the 50 to 99 Relief. B - If the employer is eligible for the 100 or More Relief.</p> |
| | <p>Enter data in the following fields for ALE members included in the Aggregated ALE Group. A maximum of 30 records can be entered.</p> <p>Member Name Employee Identification Number (EIN)</p> | |

☐ Click **Save**.

Other functions and features:

| | |
|---------------|--|
| Delete | Click to delete the entire 1094-C record. The data on all three tabs is deleted. |
|---------------|--|

1094-C Hist - HRS3880

Personnel > Maintenance > ACA 1095 YTD Data > 1094-C Hist

This tab provides a read-only view of an employer's Applicable Large Employers (ALE) member information data for Form 1094-C (Transmittal of Employer-Provided Health Insurance Offer and Coverage Information Returns) from the [1094-C](#) maintenance page. Similar to the W-2 finalization process, the 1094-C historical file data can be updated as required by running and finalizing data on the [Reports > HR Reports > Quarterly/Annual Reports > HRS5255- 1095-C Forms](#) report.

For specific information about Form 1094-C, click [here](#).

Retrieve 1094-C historical data:

| Field | Description |
|---------------|--|
| Calendar Year | Type the year for which you want to retrieve data. The year must be greater than or equal to 2015. |

Click **Retrieve** to retrieve the historical ALE member information.

ACA 1095 YTD Data

Use the Table of Contents to access a page.

1095-B - HRS3880

Personnel > Maintenance > ACA 1095 YTD Data > 1095-B

This tab allows you to manually input and track employee and covered individual year-to-date health coverage data.


Notes:

- You can import records by uploading a comma-delimited text (.txt) file using the Utilities > Import ACA 1095-B/1095-C Data page.
- For employees with a self-insured insurance plan, you can extract insurance data from the Maintenance > Staff Demo > Insurance tab to this page by using the Utilities > Extract Insurance Data to 1095 Data utility.
- For more information about Form 1095-B, click [here](#) and refer to the Instructions for Form 1095-B.

Enter 1095-B data:

| Field | Description |
|----------------------|--|
| Calendar Year | Populated with the current calendar year; however, you can enter a different year. The year must be greater than or equal to 2015. |
| Employee | Begin typing the employee name or number. As you type the data, a drop-down list of corresponding data is displayed. Select an employee and click Retrieve . Or, click Directory to perform a search in the Employees directory . Note: The employee autosuggest field includes employees whose records were created in Personnel but do not have a Pay Info or Job Info record. |
| Coverage Type | Select the coverage type (i.e., origin of policy) in which the employee is enrolled. <i>A - Small business health options program (SHOP)</i> <i>B - Employer-sponsored coverage</i> <i>C - Government-sponsored program</i> <i>D - Individual market insurance</i> <i>E - Multiemployer plan</i> <i>F - Miscellaneous minimum essential coverage</i> |


☐ Under **Covered Individuals**, complete the following fields for each covered individual:

| | |
|--------------------|---|
| First Name | Type the covered individual's first name. The field is 17 characters. |
| Middle Name | Type the covered individual's middle name. The field is 14 characters. |
| Last Name | Type the covered individual's last name. The field is 25 characters. |
| Generation | Click  to select the covered individual's generation code. |

| | |
|------------|---|
| SSN | Type the covered individual's nine-digit social security number. Form revision per 2016 IRS guidelines, effective for the 2016 tax year: In the SSN or Other TIN field, type the covered individual's nine-digit social security number or other taxpayer identification number. |
| DOB | Type the covered individual's date of birth in the MMDDYYYY format. Or, select a date from the calendar. Form revision per 2016 IRS guidelines, effective for the 2016 tax year: In the DOB (If SSN or other TIN is not available) field, type the covered individual's date of birth in the MMDDYYYY format only if the SSN or other TIN field is blank. |
| All | Select to indicate that the individual was covered for at least one day per month for all 12 months of the calendar year. Or, if the individual was not covered for all months, select the applicable month (Jan-Dec) fields in which the individual was covered for at least one day during the month. |

☐ Click **Save**.

Other functions and features:

| | |
|---|---|
|  | Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click Save . |
| Delete | Click to delete the entire record. |

1095-B Hist - HRS3880

Personnel > Maintenance > ACA 1095 YTD Data > 1095-B Hist

This tab provides a read-only view of an individual's yearly health coverage data information from the [1095-B](#) maintenance page. Similar to the W-2 finalization process, the 1095-B historical file data can be updated as required by running and finalizing data on the [Personnel > Reports > Payroll Information Reports > 1095-B Forms](#) report.

View 1095-B historical data:

| Field | Description |
|---------------|--|
| Calendar Year | Populated with the current calendar year; however, you can enter a different year. The year must be greater than or equal to 2015. |
| Employee | Begin typing the employee name or number. As you type the data, a drop-down list of corresponding data is displayed. Select an employee and click Retrieve . Or, click Directory to perform a search in the Employees directory . Note: The employee autosuggest field includes employees whose records were created in Personnel but do not have a Pay Info or Job Info record. |

1095-C - HRS3880

Personnel > Maintenance > ACA 1095 YTD Data > 1095-C

This tab allows you to manually input and track year-to-date health coverage offers and health coverage enrollment details for employees and their covered individuals.

Notes:

- You can import records by uploading a comma-delimited text (.txt) file using the Utilities > Import ACA 1095-B/1095-C Data page.
- For employees with a self-insured insurance plan, you can extract insurance data from the Maintenance > Staff Demo > Insurance tab to this page by using the Utilities > Extract Insurance Data to 1095 Data utility.
- For more information about Form 1095-C, click [here](#) to view Form 1095-C and review the Instructions for Form 1095-C.
- The page consists of two grids.


[File layout](#)

Enter 1095-C data:

| Field | Description |
|---------------|--|
| Calendar Year | Populated with the current calendar year; however, you can enter a different year. The year must be greater than or equal to 2015. |
| Employee | Begin typing the employee name or number. As you type the data, a drop-down list of corresponding data is displayed. Select an employee and click Retrieve . Or, click Directory to perform a search in the Employees directory . Note: The employee autosuggest field includes employees whose records were created in Personnel but do not have a Pay Info or Job Info record. |

In the top grid:

| | |
|--------------------------|---|
| Offer of Coverage | <p>Make the necessary selections: If the employee received the same offer for the entire calendar year (January-December), in the All field, click ▼ to select the received offer of coverage.</p> <p>1A - Qualifying Offer 1B - Offer to employee only 1C - Offer to employee and dependents 1D - Offer to employee and spouse 1E - Offer to employee, spouse, and dependents 1F - Offer of coverage not providing the minimum value 1G - Employee not full-time and enrolled in self-insured coverage 1H - No offers 1I - Qualifying offer transition relief - This option is no longer available, it was only applicable for the 2016 tax year. 1J - Offer to employee, spouse conditional, not to dependents 1K - Offer to employee and dependents, spouse conditional</p> <p>If the employee received various offers during the calendar year, click ▼ for the individual month(s) and select the received offer of coverage.</p> <p>1095-C Forms report notes: If the Offer of Coverage (line 14) is 1A, 1F, 1G or 1H, the Employee Share (line 15) field is blank.</p> <p>If the Offer of Coverage (line 14) is 1B-1E or 1J-1K, the Employee Share (line 15) field is printed.</p> <p>If the Offer of Coverage (line 14) code in all individual month (Jan-Dec) fields matches the code in the All field, then that code is printed in the All field, and the individual month fields are blank.</p> <p>If all individual month (Jan-Dec) fields are blank but the All field is populated, then that Offer of Coverage code is printed in the All field and the individual month (Jan-Dec) fields remain blank.</p> <p>If the Offer of Coverage code varies in the individual month (Jan-Dec) fields, then the All field is blank and the codes in the individual month (Jan-Dec) fields are printed.</p> |
| Employee Share | <p>Type the employee share amount of the lowest-cost monthly premium for self-only minimum essential coverage providing minimum value that is offered to the employee.</p> <p>1095-C Forms report notes:</p> <p>If the value in all of the individual month (Jan-Dec) fields match the value in the All field, then that value is printed in the All field and the individual month fields are blank.</p> <p>If the value is zero in all individual month (Jan-Dec) fields but the All field is populated, then that value is printed in the All field and the individual month fields are blank.</p> <p>If the value varies in the individual month (Jan-Dec) fields, then the All field is blank and the values in the individual month (Jan-Dec) fields are printed.</p> |


| | |
|--------------------|---|
| Safe Harbor | <p>Click  to select the Section 4980H safe harbor employer relief code that applied to the employee.</p> <p>If the same safe harbor code applied to the employee for all 12 calendar months, select the applicable code in the All drop-down field.</p> <p>If different safe harbor codes applied to the employee throughout the 12 calendar months, select the applicable codes in the respective month (Jan-Dec) fields.</p> <p><i>2A - Employee not employed on any day of the month</i> <i>2B - Employee not a full-time employee for the month and did not enroll in coverage</i> <i>2C - Employee enrolled in coverage offered</i> <i>2D - Employee was in a Limited Non-Assessment Period</i> <i>2E - Multiemployer interim rule relief</i> <i>2F - W-2 safe harbor</i> <i>2G - Federal poverty line safe harbor</i> <i>2H - Rate of pay safe harbor</i> <i>2I - Non-calendar year transition relief</i> - This option is no longer available, it was only applicable for the 2016 tax year.</p> <p>Note: It is possible that more than one circumstance applied to the same employee in the same month; however, only one code can be selected per month.</p> <p>1095-C Forms report notes:</p> <p>If the Safe Harbor (line 16) code in all individual month (Jan-Dec) fields matches the code in the All field, then that code is printed in the All field and the individual month fields are blank.</p> <p>If all individual month (Jan-Dec) fields are blank but the All field is populated, then that Safe Harbor code is printed in the All field and the individual month (Jan-Dec) fields remain blank.</p> <p>If the Safe Harbor code varies in the individual month (Jan-Dec) fields, then the All field is blank and the codes in the individual month (Jan-Dec) fields are printed.</p> |
|--------------------|---|

☐ Click **Save** to save the changes.

In the bottom grid:


Under **Covered Individuals**, complete the following fields for each covered individual:

| | |
|-------------------------|---|
| Self-Insured | Select if the employer-provided self-insured coverage, and then enter the necessary information for each covered individual. If selected, at least one covered individual record must exist. |
| Plan Start Month | Type the two-digit number (01 through 12) indicating the calendar month during which the plan year begins for the health plan in which the employee is offered coverage (or would be offered coverage if the employee were eligible to participate in the plan). If more than one plan year could apply (for instance, if the ALE Member changes the plan year during the year), enter the earliest applicable month. |
| Employee | Select to indicate that the covered individual is an employee. This field can only be selected for one covered individual. |
| First Name | Type the covered individual's first name. The field is 17 characters. |
| Middle Name | Type the covered individual's middle name. The field is 14 characters. |
| Last Name | Type the covered individual's last name. The field is 25 characters. |

| | |
|-------------------|---|
| Generation | Click  to select the covered individual's generation code. |
| SSN | Type the covered individual's nine-digit social security number. Form revision per 2016 IRS guidelines, effective for the 2016 tax year: In the SSN or Other TIN field, type the covered individual's nine-digit social security number or other taxpayer identification number. |
| DOB | Type the covered individual's date of birth in the MMDDYYYY format. Or, select a date from the calendar. Form revision per 2016 IRS guidelines, effective for the 2016 tax year: In the DOB (If SSN or other TIN is not available) field, type the covered individual's date of birth in the MMDDYYYY format only if the SSN or other TIN field is blank. |
| All | Select to indicate that the individual was covered for at least one day per month for all 12 months of the calendar year. Or, if the individual was not covered for all months, select the applicable month (Jan-Dec) fields in which the individual was covered for at least one day during the month. |

☐ Click **Save**.

Other functions and features:

| | |
|---|---|
|  | Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click Save . |
| Delete | Click to delete the entire record. |

1095-C Hist - HRS3880

Personnel > Maintenance > ACA 1095 YTD Data > 1095-C Hist

This tab provides a read-only view of an individual's yearly health coverage data information from the [1095-C](#) maintenance page. Similar to the W-2 finalization process, the 1095-B historical file data can be updated as required by running and finalizing data on the [Personnel > Reports > Payroll Information Reports > HRS5255 - 1095-C Forms](#) report.

View 1095-C historical data:

| Field | Description |
|----------------------|--|
| Calendar Year | Populated with the current calendar year; however, you can enter a different year. The year must be greater than or equal to 2015. |
| Employee | Begin typing the employee name or number. As you type the data, a drop-down list of corresponding data is displayed. Select an employee and click Retrieve . Or, click Directory to perform a search in the Employees directory . Note: The employee autosuggest field includes employees whose records were created in Personnel but do not have a Pay Info or Job Info record. |

Employment Info - HRS3100

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)

Add employment data:

| | |
|-------------------------------------|---|
| Retrieve an existing record. | Begin typing the employee name or number. As you type the data, a drop-down list of corresponding data is displayed. Select an employee and click Retrieve . Or, click Directory to perform a search in the Employees directory . |
|-------------------------------------|---|

After retrieving an employee record, the employee's current employment status (**Employed/Not Employed**) is displayed next to the **Employee Status** field. The **Employed/Not Employed** status is based on the current system date and the employee's **Original Emp Date**, **Latest Re-Employ Date**, and **Termination Date**. If changes are made that affect the current employment status, the updated employment status is displayed upon saving the record.

| Field | Description |
|------------------------|---|
| Employee Status | <p>Click ▼ to select one of the following one-character codes indicating the employee's status. This field is required.</p> <p>When extracting for State Reporting, staff records with a pay type of 2 or 3 are extracted if the employee status is <i>1 - Active professional</i>, <i>2 - Active auxiliary per</i>, <i>3 - Retired</i>, or <i>8 - Temporary</i>.</p> <p><i>0 - Pending</i> - An employee with a pending status indicates that the employee is new or inactive with a demo record but does not have payroll records. 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.</p> <ul style="list-style-type: none">• <i>1 - Active professional</i>• <i>2 - Active auxillary per</i>• <i>3 - Retired</i>• <i>4 - Resigned</i>• <i>5 - On Leave</i>• <i>6 - Substitute</i>• <i>7 - Substitute retired</i>• <i>8 - Temporary</i>• <i>9 - Other</i>• <i>A - Long Term Substitute</i> |

☐ Under **Employment Dates:**

| | |
|------------------------------|--|
| Original Emp. Date | <p>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.</p> <p>This field is required to extract the employee for State Reporting.</p> <p>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.</p> |
| Latest Re-Employ Date | <p>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.</p> |
| Termination Date | <p>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.</p> <p>The termination date and reason are used to exclude the employee from TEA reporting.</p> |
| Termination Reason | <p>Click ▼ to select the reason the employee was terminated. The termination reasons are maintained on the Personnel > Tables > Job/Contract > Termination Reason tab.</p> |
| Eligible for Re-hire | <p>Select if the employee is eligible for rehire.</p> |
| Percent Day Employed | <p>PEIMS Reporting Element</p> <p>Type the percentage of each day for which this individual is employed, which indicates the percentage of a standard LEA workday for which the employee is hired to work.</p> <p>This field is required.</p> <p>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.</p> <p>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.</p> <p>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.</p> |

☐ Under **Employment Types:**

| | |
|-------------------------|--|
| Employment Type | Required TRS reporting field. Click ▼ to select the employee's employment type code. <ul style="list-style-type: none"> • <i>F - Half-Time or more</i> • <i>M - Temporary</i> • <i>P - Less than Half-Time</i> • <i>S - Substitute</i> |
| 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 | PEIMS Reporting Element 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. <ul style="list-style-type: none"> • <i>C - Combination of Substitute and Half-Time or less</i> • <i>F - Full-Time</i> • <i>H - Half-Time or less</i> • <i>S - Substitute</i> |
| 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 | PEIMS Reporting Element 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 | PEIMS Reporting Element Type the total years of professional experience for the employee in the LEA. The field can be a maximum of two digits. |
| Prior Teaching | PEIMS Reporting Element 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 | PEIMS Reporting Element 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 | <p>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.</p> <p>If the 1095 Electronic Consent field is not selected on Payroll > Tables > District EP Options > EmployeePortal Options tab, then this field is not applicable.</p> <p>If Yes is selected, the employee must log on to EmployeePortal to print the 1095.</p> <p>If No is selected, the employee will receive a printed, mailed copy from the LEA.</p> <p>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.</p> |
|-------------|---|

☐ 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 **Auxiliary Role ID**:

| | |
|--------------------------|--|
| Auxiliary Role ID | PEIMS Reporting Element 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. |
| 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 district must use its discretion in determining if the employee is serving in a professional or non-professional capacity.

☐ Under **Paraprofessional Certification:**

| | |
|-------------------|--|
| Para Cert | PEIMS Reporting Element 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.

Other functions and features:

| | |
|------------------|--|
| Documents | View or attach supporting documentation. |
|------------------|--|

Employment Info - HRS3100

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~~HIDEPAGE~~

Health Insurance Status - HRS3860

Personnel > Maintenance > Health Insurance Status

This page is used to track and record the employer's health insurance offer dates and the employee's response to each offer. This data is used to ensure that the employer is in compliance with the Affordable Care Act (ACA) by offering health coverage to all applicable employees.

Retrieve and add health insurance offer data:


| Field | Description |
|-----------------|--|
| Employee | Begin typing the employee name or number. As you type the data, a drop-down list of corresponding data is displayed. Select an employee and click Retrieve . Or, click Directory to perform a search in the Employees directory . Note: The employee autosuggest field includes employees whose records were created in Personnel but do not have a Pay Info or Job Info record. |

☐ Click **+Add** to add a row.

| | |
|----------------------|--|
| Offer Date | Type or select the date the employee was offered health insurance in the MMDDYYYY format. |
| Action Status | Select one of the following options to record the employee's response to the health insurance offer. Accept - accepted the health insurance offer Reject - rejected the health insurance offer |

☐ Click **Save**.

Other functions and features:

| | |
|---|--|
| Retrieve | The Retrieve button is also used to retrieve information from the last save. If you click Retrieve , any unsaved changes are lost. |
| Print | Click to print the report. Review the report . |
|  | Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click Save . |

Health Insurance Status - HRS3860

This page is intentionally left blank.

~~HIDEPAGE~~

Staff Demo

Use the Table of Contents to access a page.

Credentials - HRS3000

[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/.

Add credential data:

| | |
|------------------------------------|---|
| Retrieve an existing record | <p>Begin typing the employee name or number. As you type the data, a drop-down list of corresponding data is displayed. Select an employee and click Retrieve. Or, click Directory to perform a search in the Employees Directory.</p> <p>Note: The employee autosuggest field includes employees whose records were created in Personnel but do not have a Pay Info or Job Info record. If the employee number does not exist in the system, a message is displayed prompting you to create a new employee. Click Yes.</p> |
|------------------------------------|---|

☐ Click **+Add** to add a row.

☐ Under **Education**:

| Field | Description |
|----------------|---|
| College | Click  to select the college that the employee attended. |
| Year | Type the year the employee received the degree in the YYYY format. |
| Major | Click  to select the college major for the employee. |
| Minor | Click  to select the college minor for the employee. |
| Degree | Click  to select the degree the employee received from the learning institution. |

☐ Click **Refresh College** to update the education grid if any education information is changed or if a new row is added.

☐ Under **Teacher Incentive Allotment Designation**:

The data displayed in this drop down is tied to the year indicated in the **School Year for PEIMS**

Codes field on the District HR Options page.

| | |
|-----------------------|--|
| Allotment Code | <p>PEIMS Reporting Element</p> <p>TWEDS Data Element: TEACHER-INCENTIVE-ALLOTMENT-DESIGNATION-CODE (E1722) (Code table: DC165)</p> <p>Click ▼ to select the appropriate teacher (ROLE-ID 087) allotment code.</p> <ul style="list-style-type: none"> • <i>01 Active National Board Certified Teacher</i> - Indicates that the teacher is an Active National Board Certified Teacher. • <i>02 Active Teacher Incentive Allotment Designation</i> - Indicates that the teacher holds a current designation (Recognized, Exemplary, or Master). • <i>03 LEA Submitted Designation Pending</i> - Indicates that the teacher has been submitted by an LEA for a new or change of designation in the Teacher Incentive Allotment. |
|-----------------------|--|

☐ Under **Certification**:


| | |
|--------------------------------|--|
| Date | Type the date when the employee received the certificate in the MMDDYYYY format. |
| Specialty Area | Click ⋮ to select the general area or level covered by the certificate. |
| Teaching Specialization | <p>PEIMS Reporting Element (if associated with a PEIMS PK Teacher Requirement)</p> <p>Click ⋮ to select the teaching specialty covered by the certificate.</p> |
| Date Expire | Type the date on which the certificate expires. |
| ExCET Yr | Type the year when the employee most recently took the ExCET examination in the YYYY format. |
| Yrs Taught | Type the number of years that the employee has taught under the certificate indicated. |
| Sem Hrs | Type the number of college credit hours the employee has earned in the subject area covered by the certificate. |

☐ Under **Special Credentials**:





| | |
|----------------------|--|
| Description | Type the name of the special credentials that the employee holds. The field can be a maximum of 20 characters. |
| Year | Type the year that the employee received the special credentials in the YYYY format. |
| Classroom Hrs | Type the number of classroom hours the employee has accrued in the specialty area. |

☐ Under **Permit**:

| | |
|---------------------|--|
| Permit Type | Click ▼ to select the type of permit that the employee holds. |
| Date | Type the month and year the employee received the permit in the MMYYYY format. |
| Issue Status | Click ▼ to select the circumstances under which the permit was issued. |

| | |
|---------------------|---|
| Ren # | Type the number of times TEA has renewed the permit. The field can contain a single digit. If the permit has not been renewed, leave the field blank. |
| Renew Date | Type the month and year the permit was renewed in the MMYYYY format. |
| Renew Status | Click  to select the circumstances under which the permit was renewed. |


☐ Under **Permit Area**:

| | |
|---------------------|--|
| Role ID | Click  to select the three-digit code that identifies the capacity in which a person serves under the permit indicated. This field is required for all permits. |
| Population | Click  to select the type of permit that the employee holds. |
| Grade Range | Click  to select the two-digit code that indicates the span of grade levels for which the permit was issued. This is required only for teaching permits. |
| Subject Area | Click  to select the two-digit code that indicates the broad subject area that an instructor is allowed to teach. This is required only for teaching permits. |
| Hrs | Type the number of college credit hours the staff member has earned in the specified subject area. |

☐ Click **Refresh Role ID** to update the permit area grid if any information is changed or if a new row is added.

☐ Click **Save** to save the changes.

Other functions and features:

| | |
|---|---|
|  | Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click Save . |
| Documents | View or attach supporting documentation. |

Demographic Information - HRS3000

[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.

Retrieve a record:

| | |
|-------------------------------------|---|
| Retrieve an existing record. | Begin typing the employee name or number. As you type the data, a drop-down list of corresponding data is displayed. Select an employee and click Retrieve . Or, click Directory to perform a search in the Employees Directory . Note: The employee autosuggest field includes employees whose records were created in Personnel but do not have a Pay Info or Job Info record. If the employee number does not exist in the system, a message is displayed prompting you to create a new employee. Click Yes . |
|-------------------------------------|---|

Add a record:

☐ 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**.

| | |
|--------------------|--|
| Last Change | The date that the employee's record was last changed is displayed in the MMDDYYYY format. Once a record is saved, the date of the last change to any data on the tab is displayed. |
|--------------------|--|

| Field | Description |
|--|--|
| Staff ID/SSN (Social Security Number) | <p>PEIMS Reporting Element</p> <p>This field is only enabled when adding a new employee record. Type the employee's nine-digit social security number, which uniquely identifies the employee.</p> <p>If this field needs to be updated for an existing employee, use the Personnel > Utilities > Change Staff ID utility.</p> <p>Reported to SSA, IRS, and TRS.</p> |
| Texas Unique Staff ID | <p>PEIMS Reporting Element</p> <p>Type the 10-digit unique staff ID assigned by the Texas Education Agency (TEA).</p> <p>If the employee does not have a Unique 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.</p> <p>Review the Assign a TSDS Unique ID guide for additional information.</p> |

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 | <p>PEIMS Reporting Element</p> <p>TWEDS Data Element: FIRST-NAME (E0703)</p> <p>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.</p> <p>Reported to SSA, IRS, and TRS.</p> |

| | |
|--------------------|--|
| Middle | <p>PEIMS Reporting Element</p> <p>TWEDS Data Element: MIDDLE-NAME (E0704)</p> <p>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.</p> <p>Reported to SSA, IRS, and TRS.</p> |
| Last | <p>PEIMS Reporting Element</p> <p>TWEDS Data Element: LAST-NAME (E0705)</p> <p>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.</p> <p>Reported to SSA, IRS, and TRS.</p> |
| Generation | <p>PEIMS Reporting Element</p> <p>TWEDS Data Element: GENERATION-CODE (E0706) (Code table: C012)</p> <p>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.</p> |
| Maiden Name | <p>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.</p> |

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

☐ Complete the following employee demographic fields:

| | |
|------------|---|
| Sex | <p>PEIMS Reporting Element</p> <p>TWEDS Data Element: SEX-CODE (E0004) (Code table: C013)</p> <p>Click ▼ to select the employee's gender.</p> <p>Reported to TRS and TEA.</p> |
|------------|---|

| | |
|-------------------------|---|
| DOB | PEIMS Reporting Element TWEDS Data Element: DATE-OF-BIRTH (E0006) 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 | PEIMS Reporting Element TWEDS Data Element: HISPANIC-LATINO-CODE (E1064) (Code table: C088) 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 | PEIMS Reporting Element TWEDS Data Element: AMERICAN-INDIAN-ALASKA-NATIVE-CODE (E1059) (Code table: C088) 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 | PEIMS Reporting Element TWEDS Data Element: ASIAN-CODE (E1060) (Code table: C088) Select if the employee has origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam. |
| Black African American | PEIMS Reporting Element TWEDS Data Element: BLACK-AFRICAN-AMERICAN-CODE (E1061) (Code table: C088) Select if the employee has origins in any of the black racial groups of Africa. |
| Native Hawaiian Pacific Islander | PEIMS Reporting Element TWEDS Data Element: NATIVE-HAWAIIAN-PACIFIC-ISLANDER-CODE (E1062) (Code table: C088) Select if the employee has origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands. |
| White | PEIMS Reporting Element TWEDS Data Element: WHITE-CODE (E1063) (Code table: C088) Select if the employee has origins in any of the original peoples of Europe, the Middle East, or North Africa. |

☐ Under **Phone**:

Complete the following for the **Hm** phone fields:

| | |
|------------------|---|
| Area Cd | Type the three-digit area code of the employee's home phone number. |
| Phone Nbr | Type the seven-digit home phone number. |



Complete the following **Bus** phone fields:

| | |
|------------------|---|
| Area Cd | Type the three-digit area code of the employee's business phone number. |
| Phone Nbr | Type the seven-digit business phone number. |
| Ext | Type the four-digit maximum business extension number. |

Complete the following **Cell** phone fields:

| | |
|------------------|---|
| Area Cd | Type the three-digit area code of the employee's cell phone number. |
| Phone Nbr | Type the seven-digit cell phone number. |

☐ Under **Restrictions**:

| | |
|---------------|--|
| Local | Click  to select employee data that is restricted from local distribution. |
| Public | Click  to select employee data that is restricted from public distribution. |

☐ Under **Local Use**, in the **1** and **2** fields, type the locally assigned data. The fields can be a maximum of ten characters.

☐ Click **Emp Notes** to add or view existing notes about a specific employee. The Employee Notes pop-up window is displayed. A paperclip is displayed on the **Emp Notes** button if there are existing notes.

| | |
|--------------------|---|
| Work E-mail | <p>Type the employee's work email address. The field can be a maximum of 45 characters. Click Work E-mail to send an email message to the employee's work email address using your default email program. The To: email address is populated if the Work E-mail field contains an email address.</p> <p>The work email address is used by the system to send notifications from EmployeePortal such as wage and earning statements. This email address is also used to send workflow notifications from various applications (e.g., Purchasing, Warehouse, etc.).</p> |
|--------------------|---|

Allowed work email address domains

| | |
|--------------------|--|
| Home E-mail | <p>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.</p> |
|--------------------|--|

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.

Insurance - HRS3000

[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.

Add insurance data:

| | |
|------------------------------------|--|
| Retrieve an existing record | <p>Begin typing the employee name or number. As you type the data, a drop-down list of corresponding data is displayed. Select an employee and click Retrieve. Or, click Directory to perform a search in the Employees Directory.</p> <p>Note: The employee autosuggest field includes employees whose records were created in Personnel but do not have a Pay Info or Job Info record.</p> <p>If the employee number does not exist in the system, a message is displayed prompting you to create a new employee. Click Yes.</p> |
|------------------------------------|--|


☐ Click **+Add** to add a row.

| Field | Description |
|------------------------------|--|
| Company | Click ▼ to select an insurance company. |
| Plan Number | Type or click ⓘ to select a plan number for the selected insurance company. Or, press the SPACEBAR to view a list of available plan numbers. |
| Plan Type | Click ▼ to select a plan type to include the appropriate family members. |
| Employee Insurance ID | Type the insurance ID for the employee. The field can be a maximum of 20 digits. This field is optional. |

Under **Individuals Covered By**:



☐ Click **+Add** to add a row for each individual (including the employee) covered by the selected plan in the top grid.

| | |
|-----------------|---|
| SSN | Type the nine-digit social security number of the family member covered by the employee's insurance policy. |
| DOB | Type the family member's date of birth in the MMDDYYYY format. |
| Relation | Click ▼ to select the relationship of the dependent to the employee. |

| | |
|-----------------------|--|
| First Name | Type the first name of the dependent. The field can be a maximum of 17 characters. |
| Middle Name | Type the middle name of the dependent. The field can be a maximum of 14 characters. |
| Last Name | Type the last name of the dependent. The field can be a maximum of 25 characters. |
| Gen | Click  to select a generation code for the covered individual. |
| Coverage Begin | Type the date that the insurance coverage begins in the MMDDYYYY format. |
| Coverage End | Type the date that the insurance coverage was terminated in the MMDDYYYY format. If the insurance coverage is still active, leave this field blank. |

☐ Click **Save**.

Other functions and features:

| | |
|---|--|
| Retrieve | The Retrieve button is also used to retrieve information from the last save. If you click Retrieve , any unsaved changes are lost. |
|  | Click to view additional details for a selected row. |
|  | Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click Save . |
| Documents | View or attach supporting documentation. |

Responsibility - HRS3000

[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.

See the [Quick Reference by Professional or Auxiliary Role ID](#) for additional information.

Note: If you need to delete a responsibility record for multiple employees, use the [Personnel > Utilities > Mass Delete > Responsibility Data](#) page.



This tab is re-designed to support state reporting for instructional and non-instructional employees.

- The fields in the first and second columns are used for non-instructional employees.
- The fields in the second and third columns are used for instructional employees.

Add responsibility data:




| Retrieve an existing record. | Begin typing the employee name or number. As you type the data, a drop-down list of corresponding data is displayed. Select an employee and click Retrieve . Or, click Directory to perform a search in the Employees Directory . Note: The employee autosuggest field includes employees whose records were created in Personnel but do not have a Pay Info or Job Info record. If the employee number does not exist in the system, a message is displayed prompting you to create a new employee. Click Yes . |
|-------------------------------------|---|
| Field | Description |
| School Year for PEIMS Codes | The school year for the PEIMS edit tables as entered on the Payroll/Personnel > Tables > District HR Options page is displayed. |

A list of responsibility records for the current **School Year for PEIMS Codes** and the current **School Year for PEIMS Codes** minus one is displayed for the selected employee.

☐ Click **+Add** to add a row.

| | |
|-----------------|---|
| Job Code | Click ▼ to select the four-character district-defined code that identifies the specific job to which this individual is being assigned during the period indicated. This is not a required field and is not required for state reporting. |
|-----------------|---|

| | |
|---------------------------------------|---|
| Role ID / Staff Classification | <p>PEIMS Reporting Element</p> <p>Click ▼ to select the code that identifies the capacity in which a person serves (e.g., teacher, art therapist, or superintendent). If a person's actual role is not listed in code table C021, choose the closest approximation. Instructional Educational Aides are reported as role 033.</p> |
| Staff Service | <p>PEIMS Reporting Element</p> <p>Click ■ to select the eight-digit code that indicates the services supplied by staff.</p> |
| Pop Served | <p>PEIMS Reporting Element</p> <p>Click ▼ to select the two-digit code that identifies the student population for which a service was designed or intended. It does not necessarily identify program eligibility. Only one code can be reported per course section. If intent cannot be determined, use code 01 (i.e., Regular Students).</p> |
| SPED Student Age Range | <p>Click ▼ to select the code that identifies the age range of Special Education students.</p> <ul style="list-style-type: none"> • 01 Age 3 Through 5 (Not KG) • 02 Age 5 (KG) Through 21) |
| Classroom Position | <p>PEIMS Reporting Element</p> <p>Click ▼ to indicate the type of position the employee holds in the specific class/section.</p> <ul style="list-style-type: none"> • 01 Teacher Of Record • 02 Assistant Teacher • 03 Support Teacher • 04 Substitute Teacher • 05 PK Classroom Aide |
| Local Course Code | <p>PEIMS Reporting Element</p> <p>Type the local code assigned by the LEA that identifies the course offering provided for the instruction of students.</p> |
| Class ID / Section Identifier | <p>PEIMS Reporting Element</p> <p>Type the 14-character, alphanumeric, district-defined ID identifying a unique course section that is unique for a particular school year, campus, and service ID. This unique ID is assigned to the instructor's duties for a particular class. The class ID number can be repeated at a campus if multiple teachers are assigned to the same course section. When extracting from the master schedule, the class ID number is set to the course number (four to eight digits) + two-digit section number + one-digit semester number + padding with zeros. Example: 0901-11-1-0000000 Spaces are not allowed in the Class ID field.</p> <p>Note: When extracting from the master schedule, the class ID will be set to the four-digit course number + two-digit section number + one-digit semester number + 0000000. The first seven digits of the class ID are required, and the system will automatically fill the remaining with 0000000 when the user clicks Save.</p> |
| Session Name | Type the session name. |

| | |
|----------------------|---|
| # of Students | <p>PEIMS Reporting Element</p> <p>Type the number of students for whom the employee is responsible. This is the count of students in membership in the class as of the reporting date. Only the Teacher of Record is reported with this number; all other staff members are reported with NUMBER-STUDENTS-IN-CLASS as 0. The field can be a maximum of three digits.</p> |
| Class Type | <p>PEIMS Reporting Element</p> <p>Click  to indicate the type of class providing instruction to students in particular class settings and is used to differentiate classes providing instruction in a regular setting classroom from non-regular classrooms. CLASS-TYPE-CODE is based on the INSTRUCTIONAL-SETTING-CODE reported on the staff responsibility record.</p> |
| Grade Level | <p>PEIMS Reporting Element</p> <p>Click  to select the grade level. This field must be populated if the Pop Served field is set to 06 and the Role ID field is set to 033, 047, or 087. Otherwise, leave the field blank.</p> |
| Service ID | <p>PEIMS Reporting Element</p> <p>Click  to select the eight-digit code that indicates the services supplied by staff, including both courses and non-teaching responsibilities. Responsibilities such as lunch monitoring duty or playground supervision are not reported.</p> |


☐ Under **PE Info**:


Per TSDS PEIMS reporting, complete the following fields for physical education teachers (i.e., employees who have a PE **Service ID** (02530002, 02530003, 02530004, 02530005, 02530006, 02530007, 02530008, 02850000, 03823000, PES00051, PES00052, PES00053, PES00054, PES00055, PES00056, 82200XXX, 82210XXX, 82930XXX, 82931XXX, 83200XXX, 83210XXX, or 84200XXX)).

Note: These fields are not reported for employees with PE substitution responsibilities (i.e., employees with service IDs PES00000-PES00015).

The number of days taught is the number of days the employee provides physical education (PE) instruction each week at the campus. This information is collected for the four weeks in October that include the last Friday in October. Valid entries are one digit between 0-7. These fields only apply to instructors who are the Teacher of Record for a course section associated with a PE service ID.



The number of minutes taught is the number of minutes the employee provides physical education (PE) instruction each week at the campus. This information is collected for the four weeks in October that include the last Friday in October. Valid entries are up to four digits between 0-3000. These fields only apply to instructors who are the Teacher of Record for a course-section associated with a PE service ID.

| | |
|-------------------|--|
| Days Wk 1 | PEIMS Reporting Element Type the value that indicates the number of days in which physical education instruction is provided each week for each course-section by campus during the first week of the 4 weeks in October that includes the last Friday in October. |
| Min Wk 1 | PEIMS Reporting Element Type the value that indicates the number of minutes in which physical education instruction is provided each week for each course-section by campus during the first week of the 4 weeks in October that includes the last Friday in October. |
| Days Wk 2 | PEIMS Reporting Element\ Type the value that indicates the number of days in which physical education instruction is provided each week for each course-section by campus during the second week of the 4 weeks in October that includes the last Friday in October. |
| Min Wk 2 | PEIMS Reporting Element Type the value that indicates the number of minutes in which physical education instruction is provided each week for each course-section by campus during the second week of the 4 weeks in October that includes the last Friday in October. |
| Days Wk 3 | PEIMS Reporting Element Type the value that indicates the number of days in which physical education instruction is provided each week for each course-section by campus during the third week of the 4 weeks in October that includes the last Friday in October. |
| Min Wk 3 | PEIMS Reporting Element Type the value that indicates the number of minutes in which physical education instruction is provided each week for each course-section by campus during the third week of the 4 weeks in October that includes the last Friday in October. |
| Days Wk 4 | PEIMS Reporting Element\ Type the value that indicates the number of days in which physical education instruction is provided each week for each course-section by campus during the fourth week of the 4 weeks in October that includes the last Friday in October. |
| Min Wk 4 | PEIMS Reporting Element Type the value that indicates the number of minutes in which physical education instruction is provided each week for each course-section by campus during the fourth week of the 4 weeks in October that includes the last Friday in October. |
| Campus | PEIMS Reporting Element Click  to select the code that identifies the campus to which the employee is assigned. If the duties are not related to a particular campus for the responsibility record, select 700 - Administration. |
| Begin Date | PEIMS Reporting Element Type the date that the employee began in the selected role ID in the MM-DD-YYYY format, or select a date from the calendar. |

| | |
|------------------------|---|
| End Date | PEIMS Reporting Element Type the date that the employee ended in the selected role ID in the MM-DD-YYYY format, or select a date from the calendar. The end date cannot be prior to the begin date. |
| ESC/SSA | PEIMS Reporting Element Click  to select the code that indicates if the staff member works for an educational service center (ESC) only or is also part of an ESC shared service arrangement. |
| Monthly Minutes | PEIMS Reporting Element Type up to five digits for the maximum number of minutes in a month devoted to a particular class. A month is generally considered to be the four weeks prior to the fall snapshot date. The total MONTHLY-MINUTES are reported for each service. The four weeks preceding the snapshot date must be considered to calculate the monthly minutes. Examples: <ul style="list-style-type: none"> • A class taught for one hour every day would report 1,200 monthly minutes (60 minutes x 5 days x 4 weeks). • A class taught one hour three times each week would report 720 monthly minutes (60 minutes x 3 days x 4 weeks). • A class taught for different amounts of time each week would be reported with a cumulative monthly minute total. Note: Monthly Minutes are required for counselors. |

☐ Click **Save**.

Other functions and features:

| | |
|---|--|
| Retrieve | The Retrieve button is also used to retrieve information from the last save. If you click Retrieve , any unsaved changes are lost. |
|  | Click to view additional details for a selected row. |
| Documents | View or attach supporting documentation. |
|  | Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click Save . |

Service Record - HRS3000

[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.

Add service record data:

| | |
|------------------------------------|---|
| Retrieve an existing record | <p>Begin typing the employee name or number. As you type the data, a drop-down list of corresponding data is displayed. Select an employee and click Retrieve. Or, click Directory to perform a search in the Employees Directory.</p> <p>Note: The employee autosuggest field includes employees whose records were created in Personnel but do not have a Pay Info or Job Info record. If the employee number does not exist in the system, a message is displayed prompting you to create a new employee. Click Yes.</p> |
|------------------------------------|---|

☐ Click **+Add** to add a row to the top grid. The fields in the lower free-form area are cleared allowing you to enter new data.

| Field | Description |
|----------------------------------|--|
| School Year | Type the year for which the service record is to be created in the YYYY format. More than one record may be created for a year. |
| Position Held Description | Type a description of the position held. The field can be a maximum of 30 characters. |
| School Grades Taught | Type the grades taught. The field can be a maximum of seven characters. |
| Years Experience | <p>Type the maximum years of experience for the employee. The field can be a maximum of two digits.</p> <p>When using the Extract Teacher Service Record utility, the Years Experience field is based on the TRS position code and is populated on the service record based on the Years in District field on the Maintenance > Staff Job/Pay Data Employment Info tab. According to TEA guidelines, the only information required for paraprofessionals is the school year, service begin and end dates, and state leave. All other information, including years of experience, is not required for paraprofessionals as they are not on a state-mandated salary schedule.</p> |
| Full Semester | Select to indicate that the employee worked a full semester that was less than 90 days. |
| % Day Employed | Type the percentage of each normal workday accounted for by the job for which data is being entered. |
| # of Days Employed | Type the number of days to be covered by this employee's contract. You may type two digits to the right of the decimal point. |
| Service Begin Date | Type the beginning date of the contract in the MMDDYYYY format. |

| Field | Description |
|-------------------------|---|
| Service End Date | Type the ending date of the contract for the employee in the MMDDYYYY format. |
| District Type | Select the school district type. The field automatically defaults to the District Type selected on the District Administration > Tables > District Information > District Name/Address tab. If <i>Private</i> is selected in District Administration, the field defaults to <i>Private</i> . If <i>Independent</i> or <i>Charter</i> are selected, the field defaults to <i>Public</i> . |

Under **State Sick Leave**:



| | |
|---------------------------------------|---|
| State Sick Leave - PY Balance | Type the number of days of prior year state sick leave for the employee. |
| State Sick Leave Earned | Type the number of days of earned state sick leave for the employee. |
| State Sick Leave Used | Type the number of days of used state sick leave for the employee. |
| State Sick Leave - EOY Balance | Type the number of days of end-of-year state sick leave for the employee. Prior year balance leave plus earned leave minus used leave must equal end-of-year leave. |

Under **State Personal Leave**:

| | |
|---|---|
| State Personal Leave - PY Balance | Type the number of days of prior year state personal leave for the employee. |
| State Personal Leave Earned | Type the number of days of earned state personal leave for the employee. |
| State Personal Leave Used | Type the number of days of used state personal leave for the employee. |
| State Personal Leave - EOY Balance | Type the number of days of end-of-year state personal leave for the employee. Prior year balance leave plus earned leave minus used leave must equal end-of-year leave. |

☐ Click **Save**.

Other functions and features:

| | |
|---|--|
| Retrieve | The Retrieve button is also used to retrieve information from the last save. If you click Retrieve , any unsaved changes are lost. |
| Print | Click to print data. Review the report. |
|  | Click to view additional details for a selected row. |
|  | Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click Save . |
| Documents | View or attach supporting documentation. |

Verification - HRS3000

[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.

View demographic and employment data:

| | |
|------------------------------------|---|
| Retrieve an existing record | Begin typing the employee name or number. As you type the data, a drop-down list of corresponding data is displayed. Select an employee and click Retrieve . Or, click Directory to perform a search in the Employees Directory . Note: The employee autosuggest field includes employees whose records were created in Personnel but do not have a Pay Info or Job Info record. If the employee number does not exist in the system, a message is displayed prompting you to create a new employee. Click Yes . |
|------------------------------------|---|

Other functions and features:

| | |
|------------------|--|
| Retrieve | The Retrieve button is also used to retrieve information from the last save. If you click Retrieve , any unsaved changes are lost. |
| Documents | View or attach supporting documentation. |

Summer School Contracts

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~~HIDEPAGE~~