

Extract Teacher Service Record - HRS7500

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This page is used to extract information from stored employee data and create a service record. The service record detail can then be accessed by school year on the Service Record tab. No labels are created, and you can wait to print the employee service record until such time as the employee leaves the district. The TEA Teacher Service Record guidelines can be found on http://tea.texas.gov/Texas_Educators/Salary_and_Service_Record/Teacher_Salary_and_Service_Information/.

See Service Record Checklist.

Notes:

- If there are no employees that match the extract criteria, no service record is created, and the system issues the following message: “No Service Data Extracted.”
- The Service Record Extract extracts all job records, but leave information applies to the primary job only.

Extract service records:

Field	Description
School Year	This field is automatically populated by the data in the District Finance Options page but can be modified.
Frequency	The system selects the payroll frequencies authorized for use by the user but can be modified.
Pay Type	Set to blank (All) by default. Select pay type numbers by using one of the following methods: Type a pay type number for individual extract or more than one pay type by placing a comma between the pay type numbers (i.e., 1, 2). Click ⋮ to select one or more pay types. **Note**: Pay type 4 employees will only be extracted if the employee has a contract begin date and a contract end date.
Job Code	Set to blank (All) by default. Select job code numbers by using one of the following methods: Type a job code number for individual extract or more than one job code by placing a comma between the job codes (i.e., 5,76,3 = 0005, 0076, 0003). Click ⋮ to select one or more job codes.

Field	Description
Accrual Code	Set to blank (All). Select accrual numbers by using one of the following methods: Type an accrual number for individual extract or more than one accrual code by placing a comma between the accrual codes (i.e., A/5,B/5 where A and B are the accrual codes, and 5 is the pay frequency for the accrual code). Click ⋮ to select one or more accrual codes.
Extract ID	Set to blank (All). Select extract IDs by using one of the following methods: Type an extract IDfor individual extract or more than one extract ID by placing a comma between the extract IDs (i.e., 10, 11). Click ⋮ to select one or more extract IDs.
Employee Nbr	Set to blank (All). Select employees by using one of the following methods: Type an employee number for individual extract, or more than one employee number can be retrieved by placing a comma between the employee numbers (i.e., 5,76,3 = 000005, 000076, 000003). Click ⋮ to select one or more employees.
Hours Per Day (if required)	Type the number of hours worked each day, if required. If the **Days/Hours** selection is **Hours** on the Leave Type table for either of the state leave codes selected on the District Options table, the leave hours are converted to days by using the Standard Hours per Workday field on the District HR Options table or the **Hours Per Day** field on the Extract Teacher Service Record page. If **Hours Per Day** is populated, the field overrides the populated **Standard Hours per Workday** field on the HR Options table. To convert the hours into days, the system divides the standard hours per workday or hours per day into the employees' leave balance amounts. When the service record is created, the system displays the number of days that resulted from the calculation. **Example**: An employee has 27.0 hours on the Maintenance > Staff Job/Pay Data > Leave Balance tab and 8.0 hours has been typed in the Standard Hours per Workday field on the District HR Options table or in the Hours Per Day field, the extract creates a service record with 3.38 days.

Field	Description
Update Leave Only	Select to only update the leave balances for employees where the service record has been extracted previously. Only primary jobs are extracted. The system replaces the leave on the existing service table row (matched by employee/job description) with the extracted leave for that employee/job. If an employee has multiple rows on the service record table with the same job description, only the row with the latest date-time stamp (DTS) and some value in any of the leave columns is updated. If the job is not a primary job, zeros are placed in all leave fields. This feature is primarily used for those employees whose new contracts begin in July or August, and leave for the prior contract year was not posted before the service record was created. **Example #1**: New contract began 7/1/2008, and service record for the prior contract beginning 7/1/2007 was created. Leave from June was not reported and/or posted until July and/or August payroll. Therefore, leave balances need to be updated on the service record to accurately reflect the leave used and balance(s). **Example #2**: An employee was paid off early, the service record created, and later, it was found that the employee had taken leave that did not get posted prior to departure. The district can either manually update the service record leave used and balances or can update the employee's master leave record and re-extract selecting leave only.
Contract Begin Dates	Type the beginning and ending contract dates to be considered for the extract process. Use of these fields for selection purposes is optional. These dates are used when selecting the contract records for the extract process. If these dates are not used, the system extracts all employees, regardless of whether or not they were under contract for the most recent school year. To isolate your extract to only those employed under contract during the most current school year, type a beginning and ending contract date range to be used for the extract.
Payoff Dates	Type the beginning and ending payoff dates to be considered for the extract process. Use of these fields for selection purposes is optional. These dates are used when selecting the employee records for the extract process. If these dates are not used, the system extracts all employees, regardless of whether or not they were employed for the most recent school year. To isolate your extract to only those employed during the most current school year, type a beginning and ending payoff date range to be used for the extract. To pick up all employees for the school year, a beginning date of September is recommended. However, if employees left the district in August for the current school year, selecting a beginning date of September does not pick them up. Therefore, a manual record entry or individual extract needs to be run on these employees.

Field	Description
Nbr Days Employed	Type the beginning and ending number of days to limit employee selection. Typing the fewest and most number of days employed or in the contract from the Job Info tab allows the user to extract records for all employees within that range (e.g., 001-287). The system uses the **# of Days Empld** field on the Maintenance > Staff Job/Pay Data > Job Info tab and does not take into consideration the **Serv Rec Days Ded** field on the Leave Adjustment, Abs Ded, or Cd Abs Ded tabs. **Example**: If an employee has 150 days in the **# of Days Empld** field on the Maintenance > Staff Job/Pay Data > Job Info tab, and has 16.0 days in the **Serv Rec Days Ded** field on the Leave Account Transaction, Leave Adjustment tab, and enters 150 in the From Nbr Days Employed and **To Nbr Days Employed** fields, the employee extracts by the 150 days in the **# of Days Empld** field and the service record created reflects 134 days (150 - 16 = 134). The employee will not extract if 134 days is typed in the **From Nbr Days Employed** and **To Nbr Days Employed** fields.
Non-Professional Years Experience	Select **Total** or **In District**. If data exists in this field on the Maintenance > Staff Job/Pay Data > Employment Info tab, it is used to populate the service record in the following manner: If the **TRS Member Pos** field is a 01, 02, or 05, the service record always pulls from the **Total** field (under **Years Experience** in the **Professional** column on the Maintenance > Staff Job/Pay Data > Employment Info tab). If the **TRS Member Pos** field is a 03, 04, or 07. If **Total** is selected, the service record pulls from the **Total** field (under **Years Experience** in the **Non-Professional** column on the Maintenance > Staff Job/Pay Data > Employment Info tab). If **In District** is selected, the service record pulls from the **In District** field (under **Years Experience** in the **Non-Professional** column on the Maintenance > Staff Job/Pay Data > Employment Info tab).
Notes	You can modify an existing note, or type a new note. If anything was entered in the **Notes** field, and the **Update Leave Only** option is selected, the **Notes** column contains the value in the **Notes** field appended to the end. To view a list of existing notes, click the down arrow, up arrow, or SPACEBAR on the keyboard.

Click **Execute** to start the extraction process. Otherwise, click **Cancel**. If you click **Execute**, the Teacher Service Records Extract Data Preview window is displayed.

When initially displayed, the **Delete** check box is not selected for each employee in the list. Leave the **Delete** check box blank for each employee for whom a row should be created. For each extracted employee marked as **New** for whom a row should not be created, select **Delete** to prevent those employees from being extracted. If employees have existing rows in the service record table, the page also displays those rows, and the rows are not marked as **New**. Instead, the **New** column is blank, and if **Delete** is selected, the row is deleted from the service record table.

If multiple pay frequencies are selected, and an employee exists on multiple pay frequencies, all jobs associated with the employee, as well as any leave associated with the primary job in each frequency, are displayed. The leave balances are not combined but are displayed individually for each primary

job.

The **Nbr of Days Empld** field for the service record is based on the Job Info **Nbr of Days Empld** field for each job being extracted.

- If the employee has been docked for any leave day for any leave type (not just state-based leave types), the service record **Nbr of Days Empld** field will be reduced for the primary job.
- If the employee has any service record day adjustments reported on the Abs Ded or Cd Abs Ded transmittal pages, those service record day adjustments will be associated to the same job as used for the transmittal when calculating the service record **Nbr of Days Empld** field.
- If there are transmittals on the Abs Ded or Cd Abs Ded pages for an employee where the job code for the transmittal no longer exists in the employee's job master, the primary job service record days will be adjusted based on those transmittals.

Review the list using the scroll bar(s).

Click **Continue** to view the Teacher Service Record Extract Rows Deleted report. If there are no applicable records, the Rows Deleted report is not displayed, and the Rows Created report is displayed instead.

Click **Cancel** to cancel the process and return to the Extract Teacher Service Record page.

- Click **Save As** to save the report. A Save As dialog box is displayed.
- In the **Save in** field, click to select the directory/folder in which you want to save the data.
- In the **File name** field, type the name of the file.
- In the **Save as type** field, click to select the file format in which you want to save the data (e.g., text with headers).
- Click **Save**. Otherwise, click **Cancel** to close the Save As dialog box.

Click x to close the Data Preview window.

Click **Select Delete** to select the Delete check box for each row. Rows marked as "New" will not be selected for deletion.

Click **Unselect Delete** to clear the Delete check box for each row.

The Rows Deleted Data Preview window is displayed.

Review the 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.

Click **Continue** to view the Teacher Service Record Extract Rows Created report.

Click **Cancel** to cancel the process and return to the Extract Teacher Service Record page.

It is very important that this report be carefully reviewed to ensure accuracy of information, and that only the employees that meet the selection criteria are displayed. Carefully review the report, make any changes that may be necessary, and then re-extract the service record data.

If all information is correct, click **Process**.

Create a backup.

If you click **Yes**, a pop-up window is displayed with the **Frequency** and **Export File Name**. Click **Execute** to continue. Or, click **Cancel** to not create the backup and continue.

If you click **Execute** to create the system backup, a pop-up window is displayed prompting you to enter a password for the archive. Type the password and click **OK** or click **Cancel** to cancel the process. After the process is completed, the Save As window is displayed. Select the drive location to save a copy of the export.
Click **Save**. A message is displayed indicating whether or not the process was completed. Click **Yes** or **No** to either continue or end the process.

The service records in the Service Record Maintenance tab for the selected employees and for the selected school year are deleted and cannot be retrieved unless an import is performed.

Click **Cancel** to cancel the process and return to the Extract Teacher Service Record window. The new service records are not inserted into the database, and existing service records remain in the database.

A message box is displayed indicating that the process completed successfully is displayed. Click **OK** to close the message.