Personnel: Utilities

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Utilities

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ACA 1094/1095 Correction Replacement

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Correction/Replacement 1094/1095-B - HRS7970

Personnel > Utilities > ACA 1094/1095 Correction/Replacement > 1094/1095-B

This utility is used to create a correction or replacement ACA AIR 1094/1095-B .xml file.

Per IRS guidelines, most special characters are removed from the generated ACA AIR files.

Allowed characters

The following characters are allowed in the **Name** fields:

a-z
A-Z
hyphen
single space

The following characters are allowed in the **Business** Name fields:

0-9
a-z
A-Z
apostrophe
hyphen
parentheses
single space

The following characters are allowed in the **Address** fields:

0-9
a-z
A-Z
hyphen
single space

Create a correction/replacement file:

Field	Description
Payment Year	Type the ACA payment year in the YYYY format. The field defaults to the most recent ACA payment year.

Field	Description
File Name	Type a file name, and click **Retrieve**. If the file name is not known, click **Directory**. The ACA File Run Directory dialog box is displayed. Click **Search** to display all available files. You can narrow your search results by entering the following search criteria: In the **Payment Year** field, type the ACA payment year in the YYYY format. In the **File Name** field, type the ACA AIR file name. Select **Original ('O')** to include original files in the search. Select **Correction ('C')** to include correction files in the search. Select **Replacement ('R')** to include replacement files in the search. The **Run Type** field is set to B for ACA 1094/1095 - B files. Click **Search**. A list of data that matches the search criteria is displayed. Select a file from the list. The file records are populated under **1095 Record Details**. Click **Cancel** to close the dialog box.
Receipt ID	Type the receipt ID. This is a required field. The receipt ID is assigned by the IRS.

❏ Click **Replacement** to generate the 1094/1095-B replacement file. The replacement file contains all 1094/1095-B data including any corrections that were made. All LEA employees are included; therefore, it is not necessary to select employees under **1095 Record Details**.

❏ If you are creating a correction file, select the employees to be included under 1095 Record Details, and click **1095 Corrections**. The 1095 correction file only includes selected employee and district information.

Notes:

If you have multiple corrections, you can create and submit multiple 1095 correction files. All corrections do not have to be included in one file.

Per the IRS, 1094 and 1095 correction files must be submitted separately.

If any errors are encountered during the process, an error report is displayed and the file(s) is not generated. Review the report. If there are no errors, a message is displayed indicating that the process was successful.

Correction/Replacement 1094/1095-C - HRS7970

Personnel > Utilities > ACA 1094/1095 Correction/Replacement > 1094/1095-C

This utility is used to create a correction or replacement ACA AIR 1094/1095-C .xml file.

Per IRS guidelines, most special characters are removed from the generated ACA AIR files.

Allowed characters

The following characters are allowed in the **Name** fields:

a-z
A-Z
hyphen
single space

The following characters are allowed in the **Business** Name fields:

0-9
a-z
A-Z
apostrophe
hyphen
parentheses
single space

The following characters are allowed in the **Address** fields:

0-9
a-z
A-Z
hyphen
single space

Create 1094/1095-C correction/replacement files:

Field	Description
Payment Year	Type the ACA payment year in the YYYY format. The field defaults to the most recent ACA payment year.

Field	Description
File Name	Type a file name, and click **Retrieve**. If the file name is not known, click **Directory**. The ACA File Run Directory dialog box is displayed. Click **Search** to display all available files. You can narrow your search results by entering the following search criteria: In the **Payment Year** field, type the ACA payment year in the YYYY format. In the **File Name** field, type an ACA AIR file name. Select **Original ('O')** to include original files in the search. Select **Correction ('C')** to include correction files in the search. Select **Replacement ('R')** to include replacement files in the search. The **Run Type** field is set to B for ACA 1094/1095 - C files. Click **Search**. A list of data that matches the search criteria is displayed. Select a file from the list. The file records are populated under **1095 Record Details**. Click **Cancel** to close the dialog box.
Plan Start Month	Type the two-digit calendar month that indicates when the plan year begins of 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).
Receipt ID	Type the receipt ID. This is a required field. The receipt ID is assigned by the IRS.

❏ Click **Replacement** to generate the 1094/1095-C replacement file. The replacement file contains all 1094/1095-C data including any corrections that were made. All district employees are included; therefore, it is not necessary to select employees under **1095 Record Details**.

❏ If you are creating a correction file, select the employees to be included under 1095 Record Details, and click **1095 Corrections**. The 1095 correction file only includes selected employee and district information.

Notes:

- If you have multiple corrections, you can create and submit multiple 1095 correction files. All corrections do not have to be included in one file.
- Per the IRS, 1094 and 1095 correction files must be submitted separately.

If any errors are encountered during the process, an error report is displayed and the file(s) is not generated. Review the report.

If there are no errors, a message is displayed indicating that the process was completed successfully.

Change Staff ID - HRS7200

Personnel > Utilities > Change Staff ID

This utility is used to correct staff ID numbers/social security numbers.

Change a staff ID:

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.
Enter New Staff ID/SSN	Type the new nine-digit ID number.

❏ Click **Execute** to execute the process. A message is displayed confirming that you want to continue.

- Click **Yes** to continue the process.
- Click **No** to cancel the process.

If you click **Yes**, a message is displayed indicating that the staff ID process completed successfully. Click **OK**.

Change Staff ID - HRS7200

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~~HIDEPAGE~~

Copy 1095 Data - HRS7967

Personnel > Utilities > Copy 1095 Data

This page is used to copy 1095 data from one year to another year. Data is copied for employees and covered individuals who were either actively employed and/or enrolled in health coverage in December of the selected from the calendar year. The monthly coverage status and Safe Harbor data is used to determine if an employee or covered individual's data is copied.

Copy data:

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

- **Copy new records only.**
- **Delete all existing records and copy all records.**

❏ Under **Record Type**, select one of the following options:

Field	Description
ACA 1095-B	Selected by default. If selected, only covered individual records with coverage in **December** or for **All** months in the **From Calendar Year** are copied.
ACA 1095-C	If selected, only covered individual records with coverage in **December** or for **All** months in the **From Calendar Year**, and have a value other than *2A* in the **December Safe Harbor** field are copied.
From Calendar Year (YYYY)	Type the calendar year from which you want to copy data.
To Calendar Year (YYYY)	Type the calendar year to which you want to copy data.

The following fields are only displayed if ACA 1095-C is selected:

Important ACA 1095-C notes

Employee Share of Lowest Cost Monthly Premium notes:

If the **Plan Start Month** entered on the utility page is 01, the **Employee Share of Lowest Cost Monthly Premium** amount entered on the utility page is copied to the to year **Employee Share All** field on the ACA 1095 YTD 1095-C Data maintenance page. The individual month fields are populated with 0.00.

If the **Plan Start Month** entered on the utility page is greater than 01, the **Employee Share of Lowest Cost Monthly Premium** amount entered on the utility page is copied to the to year ACA 1095 YTD 1095-C Data maintenance page. The Employee Share amounts are copied from both the from year ACA 1095 YTD 1095-C record and the utility page as follows:

- The **Employee Share** individual month fields prior to the **Plan Start Month** entered on the

utility page are populated with the prior year **Employee Share** value. The Employee Share individual month fields beginning with the Plan Start Month entered on the utility page through the end of the year are populated with the **Employee Share of Lowest Cost Monthly Premium** amount entered on the utility page.

- The **Employee Share All** field is populated with 0.00.

Plan Start Month	Type the two-digit number (01 through 12) indicating the calendar month during which the plan year began for the health plan in which the employee was offered coverage.
Employee Share of Lowest Cost Monthly Premium	Type the set share of the lowest-cost monthly premium amount to be applied to the to year.

❏ Click **Execute** to execute the process. If any errors are encountered during the process, a Copy 1095-B Errors report is displayed. Review the report.

A message is displayed indicating that the process was completed successfully.

Copy 1095 Data - HRS7967

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Extract Insurance Data to 1095 Data - HRS7965

Personnel > Utilities > Extract Insurance Data to 1095 Data

This page is used to extract insurance data from the Maintenance > Staff Demo > Insurance tab to the **Covered Individuals** section on the Personnel > Maintenance > ACA YTD Data > 1095-B and 1095-C pages.

You must be logged on to a current year pay frequency to access this utility.

Notes:

If **Insert new records from Staff Demo Insurance Records.** is selected:

- If 1095-B or 1095-C employee records exist without coverage data, then the 1095-B or 1095-C coverage rows are inserted.
- If 1095-B or 1095-C employee records exist with coverage data, then no new coverage rows are inserted.
- If insurance plan data is available but no coverage data, a 1095-B or 1095-C employee record is created if it does not exist.

The **All** field is only selected if the employee has coverage for the entire year based on the **Coverage Begin** and **Coverage End** dates on the Maintenance > Staff Demo > Insurance page.

Individual month check boxes are selected based on the earliest **Coverage Begin** and latest **Coverage End** date.

Staff demo insurance coverage records are combined when multiple records have the same first name, middle name, last name, social security number, and date of birth.

If a staff demo insurance coverage record exists where the **Coverage End** date is less than the selected calendar year or the **Coverage Begin** date is greater than the selected calendar year, then the 1095-B and 1095-C records are inserted without selected check boxes.

Extract data:

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

- **Insert new records from Staff Demo Insurance Records.** - This option only inserts new information entered on the Staff Demo page since the last time 1095 data was extracted.
- **Delete all existing records and insert all records from Staff Demo Insurance Records.** - This option clears previously extracted 1095 data for the calendar year indicated and replaces it with the current data available in the Staff Demo insurance records.

❑ Under **Plan Options**, select one of the following plan options to extract:

[Additional extract notes](#)

- **Self-Insured Plans**
- **Non Self-Insured Plans** - If selected and ACA 1095-C records are extracted, no individual coverage records are extracted from the employee insurance table.

❑ Under **Record Type**, select one of the following options:

- **ACA 1095-B** (selected by default)
- **ACA 1095-C**

Field	Description
Calendar Year (YYYY)	Type the calendar year for which you want to extract data.

❑ If **ACA 1095-B** is selected, in the **Coverage Type** field, click ⌄ to select the coverage type to be extracted.

[Coverage types](#)

A - Small business health options program (SHOP)
B - Employer-sponsored coverage
C - Government-sponsored program
D - Individual market insurance
E - Multiemployer plan
F - Miscellaneous minimum essential coverage

❑ If **ACA 1095-C** is selected, enter data in the following fields:

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.
Offer of Coverage	Click ⌄ to select the coverage offer to be extracted. The selected **Offer of Coverage** code is populated in the **All** column. [Coverage offers](#) *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*

Safe Harbor	Click ⌄ to select the safe harbor code to be extracted. The selected **Safe Harbor** code is populated in the **All** column. Safe Harbor codes *2A - Employee not employed on any day of the month* *2B - Employee not a full-time employee for the month and did not enroll in coverage* *2C - Employee enrolled in coverage offered* *2D - Employee was in a Limited Non-Assessment Period* *2E - Multiemployer interim rule relief* *2F - W-2 safe harbor* *2G - Federal poverty line save harbor* *2H - Rate of pay safe harbor* *2I - Non-calendar year transition relief - This option is no longer available, it was only applicable for the 2016 tax year.*

❑ Under **Employee Share of Lowest Cost Monthly Premium**, type the set share of the lowest-cost monthly premium amount for employees in each pay type (1-4).

- The **Employee Share** field should only be entered if the **Offer of Coverage** field is set to *1B (Offer to employee only)*, *1C (Offer to employee and dependents)*, *1D (Offer to employee and spouse)*, or *1E (Offer to employee, spouse, and dependents)*. Offer of coverage codes *1J - Offer to employee, spouse conditional, not to dependents* and *1K - Offer to employee and dependents, spouse conditional* are included if the **Calendar Year** is set to 2016.
- If the set share of the lowest-cost monthly premium amount is the same for all 12 calendar months, type that monthly amount in the **All** field and do not enter data in the individual month fields.
- If the set share of the lowest-cost monthly premium amount was not the same for all 12 calendar months, type that monthly amount in the respective month (**Jan**-**Dec**) fields.

Note: When the data is extracted, if the **All** field is populated, the individual monthly fields are set to zero. If the individual monthly amounts are entered, the **All** column is set to zero and the individual monthly fields are populated.

- Only one set of values can exist for each local education agency (LEA); therefore, these values should not be updated by individual users.
- The values are saved upon clicking **Execute**.

❑ Under **Employees with Calendar YTD Data Who Do Not Have Staff Demo Insurance Records**, select one of the following options:

- **Pay Type 1-3 Employees**
- **Pay Type 1-4 Employees**

❑ Click **Execute** to execute the process.

If any errors are encountered, an Extract Staff Demo Insurance Data to 1095-B/1095C Error Report is displayed. Review the report.

❑ Click **Cancel** to return to the Extract Insurance Data to 1095 Data page.

A message is displayed indicating that the process was completed successfully. The extracted records can be viewed and modified on the Personnel > Maintenance > ACA 1095 YTD Data page.

Extract Insurance Data to 1095 Data - HRS7965

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~~HIDEPAGE~~

Extract Teacher Service Record - HRS7500

Personnel > Utilities > Extract Teacher Service Record

This utility is used to extract stored employee data to create service records. The service record details can then be accessed by school year on the Service Record tab. No labels are created and you can print the employee service record as needed such as when an employee leaves the LEA.

The TEA Teacher Service Record guidelines can be found at https://tea.texas.gov/texas-educators/salary-and-service-record/teacher-salary-and-service-information.

Notes:

- If no employees match the extract criteria, a service record is not created and the following message is displayed: "No Service Data Extracted."
- The Service Record Extract extracts all job records; however, leave information only applies to the primary job.

Extract service records:

Field	Description
School Year	Defaults to the current **School Year** on the [Finance > Tables > District Finance Options > Finance Options](#) page.
Frequency	The payroll frequencies authorized for use by the user are automatically selected.
Pay Type	Type the pay type(s) to be included separating multiple pay types with a comma (e.g., 1, 2) or click ⋮ to select one or more pay types. If blank, all pay types (including substitutes) are included. **Notes**: If a substitute is a certified teacher and they substitute for at least 90 days, it is possible for them to earn a year of service credit. **It is recommended** that those substitutes receive a service record. Pay type 4 employees are only extracted if they have a contract begin date and end date.
Job Code	Type the job code(s) to be included, separating multiple job codes with a comma (e.g., 5,76,3 = 0005, 0076, 0003) or click ⋮ to select one or more job codes. Otherwise, leave blank to include all job codes.
Accrual Code	Type the accrual code(s) to be included, separating multiple accrual codes with a comma (e.g., A/5,B/5 where A and B are the accrual codes, and 5 is the pay frequency for the accrual code) or click ⋮ to select one or more accrual codes. Otherwise, leave blank to include all accrual codes.
Extract ID	Type the extract ID(s) to be included, separating multiple extract IDs with a comma (e.g., 10, 11) or click ⋮ to select one or more extract IDs. Otherwise, leave blank to include all extract IDs.

Field	Description
Employee Nbr	Type the employee number(s) to be included, separating multiple employee numbers with a comma (e.g., 5,76,3 = 000005, 000076, 000003) or click ⋮ to select one or more employee numbers. Otherwise, leave blank to include all employee numbers.
Hours Per Day (if required)	Type the number of hours worked each day if required. If the **Days/Hours** field is set to **Hours** on the Leave Type tab for either of the state leave codes selected on the District HR Options page, the leave hours are converted to days using the **Standard Hours per Workday** field on the District HR Options page 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 District HR Options tab. To convert the hours into days, the standard hours per workday or hours per day are divided into the employees' leave balance amounts. When the service record is created, the number of days that resulted from the calculation is displayed. **Example**: An employee has 27.0 hours on the Payroll > Maintenance > Staff Job/Pay Data > Leave Balance tab and the **Standard Hours per Workday** field has 8.0 hours on the District HR Options tab or in the **Hours Per Day** field, the extract creates a service record with 3.38 days.
Update Leave Only	Select to only update the leave balances for employees where the service record has been previously extracted. Only primary jobs are extracted. The leave on the existing service table row (matched by employee/job description) is replaced by 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 are updated. If the job is not a primary job, zeros are placed in all leave fields. This feature is primarily used for employees with new contracts that 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 07-01-2022 and the service record for the prior contract beginning 07-01-2021 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 was created, and later, it was discovered that the employee took leave that did not get posted prior to leaving the LEA. The LEA can either manually update the leave used and balances on the service record or update the employee's master leave record and re-extract using the **Update Leave Only** option.
Contract Begin Dates	Type the beginning and ending contract dates to be used during the extract process. These fields are optional. If these dates are not used, all employees are extracted regardless if they were under contract for the most current school year. To narrow the data to only include employees under contract during the most current school year, type a beginning and ending contract date range.

Field	Description
Payoff Dates	Type the beginning and ending payoff dates to be used during the extract process. These fields are optional. If these dates are not used, all employees are extracted regardless if they were under contract for the most current school year. To narrow the data to only include employees under contract during the most current school year, type a beginning and ending payoff date range. To include all employees for the school year, it is recommended to enter a beginning date in September. However, if employees separated from the LEA in August for the current school year, a beginning September date will not include them. You will need to manually enter data or perform an individual extract on those employees.
Nbr Days Employed	Type the beginning and ending number of days to limit employee selection. Type the fewest and most number of days employed or in the contract from the Job Info tab 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 consider 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, then 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 reflects 134 days (150 - 16 = 134). The employee is not extracted 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 as follows: If the **TRS Member Pos** field is a 01, 02, or 05, the service record uses 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, 06, or 07: If **Total** is selected, the service record uses 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 uses the **In District** field (under **Years Experience** in the **Non-Professional** column on the Maintenance > Staff Job/Pay Data > Employment Info tab).
Notes	Type a new note or modify an existing 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 process. If you click **Execute**, the Teacher Service Records Extract Data Preview window is displayed with a list of employees who meet the selected criteria.

If there are no employees that match the extract criteria, then no service records are created and

the following message is displayed:

The initial service record extract should display **New** for all employees. If not, a service record has already been created for that particular employee for the current year. Each employee who worked in a position, excluding substitutes, should be listed on the report. Any employees who already have a service record for the current year will have two or more rows, one of which will be highlighted green. The row highlighted green represents the initial extract. Review all rows for each employee to determine which row should be permanently written to the service record. Select **Delete** for the rows to be deleted. Otherwise, click **Cancel**.

When initially displayed, the **Delete** checkbox is not selected for each employee in the list. Leave the **Delete** checkbox 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 they are not marked as **New**. Instead, the **New** column is blank and if **Delete** is selected, the row will be 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 **Nbr of Days Empld** field on the Job Info tab 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 tabs, those service record day adjustments are associated with 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 transmittal tabs 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.

❏ Identify and delete employees who do not require a service record to be created.

- Click **Select Delete** to select the **Delete** checkbox for each row. Rows marked as **New** are not selected for deletion.
- Click **Unselect Delete** to clear the **Delete** checkbox for each row.

Example 1: This employee was initially extracted with 13.5 days employed. The new row displays that the employee had 14.00 days employed. If the original (13.5 days) row is correct, select **Delete** for the new row. If the **New** row (14.00 days) is correct, then select **Delete** for the old (white) row.

Example 2: This employee has updated leave information. You must scroll right to view the column. Select the rows to be deleted.

The Rows Deleted Data Preview window is displayed. [Review the report.](#)

❑ Click **Continue** to view the Teacher Service Record Extract Rows Deleted report. Review the report. If there are no applicable records, the Rows Deleted report is not displayed and the Rows Created report is displayed instead. Otherwise, click **Cancel** to cancel the process and return to the Extract Teacher Service Record page.

❑ Click **Continue** to view the Teacher Service Record Extract Rows Created report. Otherwise, click **Cancel** to cancel the process and return to the Extract Teacher Service Record page.

Carefully review the report to ensure the accuracy of the information and those only employees who meet the selection criteria are displayed. Make changes and re-extract the service record data as needed.

❑ Click **Process**. The service records on the Personnel > Maintenance > Staff Demo > Service Record tab for the selected employees and for the selected school year are deleted and/or extracted. The deleted records cannot be retrieved unless an import is performed.

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

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

Extract Teacher Service Record - HRS7500

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Import ACA 1095-B/1095-C Data - HRS7966

Personnel > Utilities > Import ACA 1095-B/1095-C Data

This utility is used to import a comma-delimited text (.txt) file to insert insurance data to the Maintenance > ACA 1095 YTD Data > 1095-B and 1095-C pages.

You must be logged on to a current year pay frequency to access this utility.

Additional import notes:

If **Insert new records from import file.** is selected, one of the following occurs:

- If 1095-B or 1095-C employee records exist without 1095-B or 1095-C coverage data, new 1095-B or 1095-C coverage rows are inserted.
- If 1095-B or 1095-C employee records exist with 1095-B or 1095-C coverage data, no new 1095-B or 1095-C coverage rows are inserted.

If **ACA 1095-C Covered Individuals** is selected, then the **Self-Insured** indicator is set to *Y* for processed employees.

Import Covered Individuals Data File Layout

1095-C Offers of Coverage File Layout

Insert new records:

❏ Under **Import Option**, select one of the following options:

- **Insert new records from import file.**
- **Delete all existing records and insert all records from import file.**

❏ Under **Employees Identifier**, select one of the following options to include as the first identifying column in the record layout:

- **Employee Number**
- **Staff ID/SSN**

❏ Under **Record Type**, select one of the following options:

- **ACA 1095-B Covered Individuals** (selected by default)
- **ACA 1095-C Employee Offer and Coverage**
- **ACA 1095-C Covered Individuals**

❏ If **ACA 1095-B Covered Individuals** is selected, enter data in the following fields:

Field	Description
Calendar Year (YYYY)	Type the calendar year for which you want to import data.
Coverage Type	Click ⌄ to select the [coverage type](#) *A - Small business health options program (SHOP)* *B - Employer-sponsored coverage* *C - Government-sponsored program* *D - Individual market insurance* *E - Multiemployer plan* *F - Miscellaneous minimum essential coverage*

❑ If **ACA 1095-C Employee Offer and Coverage or ACA 1095-C Covered Individuals** is selected:

Calendar Year (YYYY)	Type the calendar year for which you want to import data.
Import Path	Click **Choose File**. The File Upload dialog box is displayed. Select a file to upload, and click **Open**. The file name is displayed. Click **Cancel** to close the dialog box without selecting a file.

❑ Click **Execute** to execute the process.

If any errors are encountered during the import process, the Extract ACA 1095-B/1095-C Data Error Report is displayed. [Review the report.](#)

❑ Click **Process** to proceed. Or, click **Cancel** to return to the Import ACA 1095-B/1095-C Data page.

   A message is displayed indicating that the process was completed successfully.

Import ACA 1095-B/1095-C Data - HRS7966

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Import Staff Demo Insurance Data - HRS7960

Personnel > Utilities > Import Staff Demo Insurance Data

This utility is used to import a comma-delimited text (.txt) file to insert insurance records to the Maintenance > Staff Demo > Insurance tab.

You must be logged on to a current year pay frequency to access this utility.

Notes:

If **Insert new records from import file.** is selected, one of the following occurs:

- If insurance plan data exists in the database but no coverage data, then new coverage rows are inserted.
- If insurance plan and coverage data exist in the database, then no new coverage rows are inserted and an error message is displayed.
- If the import file contains insurance plan data but no coverage data, an insurance plan record is inserted if it does not already exist.

If coverage data is duplicated in the file, the number of rows listed in the file are inserted with a unique sequence number to prevent duplicate rows in the database.

Import Staff Demo Insurance Data File Layout

Insert new records:

❑ Under **Import Option**, select one of the following options:

- **Insert new records from import file.**
- **Delete all existing records and insert all records from import file.**

❑ Under **Employees Identifier**, select one of the following options to include as the first identifying column in the record layout:

- **Employee Number**
- **Staff ID/SSN**

Field	Description
Insurance Company Code/Name	Type the insurance company code or name. A list of matching codes is displayed in the drop down. Select an insurance company code, or click ⋮ to perform a search in the Insurance Company Codes directory. Only insurance company code/names that exist on the Tables > Insurance Company Codes page are displayed. If an insurance company code is selected, the selected code overwrites the code in the file. However, if the field is left blank, the insurance company code from the file is used.
Import Path	Click **Choose File**. The File Upload dialog box is displayed. Select a file to upload, and click **Open**. The file name is displayed. Click **Cancel** to close the dialog box without selecting a file.

❏ Click **Execute** to execute the process.

If any errors are encountered during the import process, the Import Staff Demo Insurance Data Error Report is displayed. Review the report.

❏ Click **Cancel** to return to the Import Staff Demo Insurance Data page.

❏ Click **Process** to proceed.

A message is displayed indicating that the process was completed successfully.

Mass Delete

Use the Table of Contents to access a page.

Employee Data - HRS7400

Personnel > Utilities > Mass Delete > Employee Data

This utility is used to delete employee records for a number of employees at a single time. Users may select employees to delete by pay type, pay campus, and primary campus. All records are deleted for the employees as long as the following conditions exist:

- There are no amounts in the calendar year-to-date and school year-to-date maintenance pages.
- The employee does not exist in any other payroll frequency other than the next year payroll frequency.

Note: This page also allows you to delete permit, responsibility, Teacher Incentive Allotment designation, and YTD transaction data.

Mass delete employee data:

❑ Under **CYR Frequency** and **NYR Frequency**, select the applicable pay frequency(ies).

❑ Use the following fields to narrow the list of employees.

Field	Description
Pay Type	Click ⌄ to select the pay types from which employee records will be deleted.
Pay Campus	Click ⌄ to select the pay campuses from which employee records will be deleted.
Primary Campus	Click ⌄ to select the primary campuses from which employee records will be deleted.

❑ Click **Retrieve**. A list of employees who meet the selected criteria is displayed. The employee number, pay type, pay campus, primary campus, and job code are displayed as well.

❑ The **Delete** checkbox is selected for each employee in the list. Clear the **Delete** checkbox for each employee for whom employee records should not be deleted, or leave the **Delete** checkbox selected for each employee for whom employee records should be deleted.

- Click **Select All** to select the **Delete** checkbox for each employee.
- Click **Unselect All** to clear the **Delete** checkbox for each employee.

❑ Click **Execute** to execute the process. A message is displayed indicating that you are about to delete employee data and confirming that you want to continue.

- Click **Yes** to continue.
- Click **No** to return to the Employee Data page.

[Review the report.](#)

❏ Click **Process** to accept the changes and continue. If you click **Process**, you have the option to print parameter criteria.

- Click **Yes** to print the parameters selected for this update.
- Click **No** to continue.

❏ Click **Cancel** to return to the Employee Data page without making the changes.

Permit Data - HRS7400

Personnel > Utilities > Mass Delete > Permit Data

This utility is used to delete permit data for a number of employees at a single time. Permits are issued to allow staff to perform duties other than those for which they are certified. Once permit data is altered using this page, changes are reflected in the individual permit records.

Note: This page also allows you to delete responsibility, YTD transactions, and employee data.

Mass delete permit data:

A list of employees who have permit data records is displayed.

- Select the **Delete** check box for each employee for whom permit data should be deleted. Clear the selection to not delete permit data for a selected employee.
- Click **Select All** to select the **Delete** check box for all employees listed.
- Click **Unselect All** to clear the **Delete** check box for all employees listed.

❏ Click **Execute**. A message is displayed indicating that you are about to delete permit data and confirming that you want to continue.

- Click **Yes** to continue. Review the report.
- Click **No** to return to the Permit Data page.

❏ Click **Process** to accept the changes and continue. If you click **Process**, you have the option to print parameter criteria.

- Click **Yes** to print the parameters selected for this update.
- Click **No** to continue.

❏ Click **Cancel** to return to the Permit Data page without making the changes.

Responsibility Data - HRS7400

Personnel > Utilities > Mass Delete > Responsibility Data

This utility is used to delete responsibility data for a number of employees at a single time. A responsibility record contains information about a specific job responsibility of an employee. 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. Once responsibility data is altered using this page, changes are reflected in the individual responsibility records.

Note: This page also allows you to delete permit, YTD transaction, and employee data.

Mass delete responsibility data:

Field	Description
Primary Campus	Click ⌄ to select the primary campuses from which responsibility records are deleted.

❑ Under **Select Group**, the **All Employees** field is selected by default. If you select the **Teachers only** field, only role ID 029 is retrieved.

❑ Click **Retrieve**. The names of the employees that have responsibility data in their records for the campuses selected are displayed. Additional responsibility data about the employee is displayed as well.

- The **Delete** checkbox is selected for each employee in the list.
- Clear the **Delete** checkbox for each employee for whom responsibility data should not be deleted, or leave the **Delete** checkbox selected for each employee for whom responsibility data should be deleted.
- Click **Select All** to select the Delete checkbox for each employee.
- Click **Unselect All** to clear the Delete checkbox for each employee.

❑ Click **Execute** to execute the process. A message is displayed indicating that you are about to delete responsibility data and confirming that you want to continue.

- Click **Yes** to continue. Review the report.
- Click **No** to return to the Responsibility Data page.

❑ Click **Process** to accept the changes and continue. If you click **Process**, you have the option to print parameter criteria.

- Click **Yes** to print the parameters selected for this update.
- Click **No** to continue.

❑ Click **Cancel** to return to the Responsibility Data page without making the changes.

Self-Service Data - HRS7400

Personnel > Utilities > Mass Delete > Self-Service Data

This utility is used to delete self-service data for a number of employees at a single time. Pending requests will not be deleted.

Mass delete self-service data:

❑ Under **Processed Date Range**:

Field	Description
From Date	Type in the MM-DD-YYYY format the beginning date of the range of dates for which you want to delete self-service data.
To Date	Type in the MM-DD-YYYY format the ending date of the range of dates for which you want to delete self-service data.

❑ Click **Execute** to execute the process.

A message is displayed indicating that the self-service data deleted successfully.

Mass Update

Use the Table of Contents to access a page.

Employee - HRS3400

Personnel > Utilities > Mass Update > Employee

This utility is used to update employee data for a number of employees at a single time. Employee data may be updated by a variety of criteria including pay type, pay grade, primary campus, and pay frequency. The Employee tab allows users to reset, increment, or modify employee data. The data that may be altered includes the number of annual payments, number of days employed, contract begin date, and number of years of local experience. Once employee data is altered using this page, changes are reflected in the individual employee records.

Mass update employee data:

❑ Under **Parameters**, select the appropriate parameters for the employees whose employee data is to be updated.

TIP: Prior to processing a mass update, capture a screenshot of the parameters used for future reference.

Field	Description
Pay Status	Select whether active, inactive, or both groups are to be included in the process.
Pay Type	Click ˅ to select the one-digit pay type to be included in the process. The system is set to All.
Job Code	Click ˅ to select the four-digit job code to be included in the process. The system is set to All.
Accrual Code	Click ˅ to select the one-character accrual code to be included in the process. The system is set to All.
Pay Grade	Type the three-digit pay grade to be included in the process.
Prior Yr Emp Date	Type a date in the MMDDYYYY format for the previous school year reemployment date. The system will select all employees who were hired on or before that date. If there is no reemployment date from the previous school year, the system will use the employee's original employment date.
Primary Campus	Click ˅ to select the three-digit primary campus to be included in the process. The system is set to All.
Pay Campus	Click ˅ to select the three-digit pay campus to be included in the process. The system is set to All.
Contract Begin Date	Click ˅ to select the exact contract begin date to be included in the process.
Contract End Date	Click ˅ to select the exact contract end date to be included in the process.
Contract Months	Type the contract months to be included in the process.

Field	Description
Payoff Date	Click ⋮ to select the payoff date to be included in the process.
Payroll Freq	Click ⌄ to select the one-digit payroll frequency to be included in the process. The system is set to the current logged-on payroll frequency. A specific payroll frequency must be selected; otherwise, no data displays.
Salary Concept	Click ⌄ to select the salary concept to be used in the process. The system is set to All. However, when calculating salaries, a specific salary concept must be selected (e.g., A - Use annual salary table, D - Use hourly/daily rate table, or M - Use mid-point table). If All is selected, the system will not perform salary calculations.
Extract ID	Click ⌄ to select a three-character, locally assigned code (e.g., En1 = English 1, AL2 = Algebra 2, HI4 = History 4) for grouping employees. The code is used to tag employee records for a batch process (e.g., copy or extract). Each employee must have the Extract ID set in the Employment Info tab before they can be selected using this function.
Employee Nbr	If you want to update data for only one employee, type the employee number, if known. If the employee number is not known or multiple employees are needed, click ⋮ to select employees.

☐ Under **Reset**, select the employee data to reset:

Extract ID	Click ⌄ to select a locally assigned extract ID used for grouping employees. The ID is used to tag employee records for a batch process (e.g., copy or extract). Each employee must have the Extract ID set in the Employment Info tab before they can be selected using this function.
Unemployment Eligibility (ICESA Report)	Select to reset all Unemployment Eligibility Quarters in the Employment Info maintenance tab, or leave blank to not reset by unemployment eligibility. If the field is selected, click ⌄ to the right of Unemployment Eligibility and select the employee's unemployment eligibility. The system is set to Yes.
Take Retiree Surcharge	Select to reset the TRS retiree surcharge field. If the field is selected, click ⌄ to the right of **Take Retiree Surcharge**, and then select Yes or No. When this option is selected, the system is set to Yes.
NY Take Ret Surchg	Select to reset the TRS next year retiree surcharge field. If the field is selected, click ⌄ to the right of **NY Take Ret Surchg** and select Yes or No. When this option is selected, the system is set to Yes.
Employment Type	Select to reset the employee's employment type, or leave blank to not reset the employment type. If the field is selected, click ⌄ in the field to the right of Employment Type and select one of the following codes: F - Half-Time or more M - Temporary P - Less than Half-Time S - Substitute

Retiree Employment Type	Select to reset the retired employee's retiree employment type, or leave blank to not reset the retiree employment type. If the field is selected, click ⌄ in the field to the right of **Retiree Employment Type** and select one of the following codes: C - Combination of Substitute and Half-Time or less F - Full-Time H - Half-Time or less S - Substitute
Creditable Year of Service	Select to reset the employee's creditable year of service. If the field is selected, click ⌄ to the right of **Creditable Year of Service** and select *Yes* or *No*. When this option is selected, the system is set to *Yes*.

☐ Under **Update Experience**, select the employee experience to update:

- Select **Increment** to increase the selected years of experience by one.
- Select **Decrement** to decrease the selected years of experience by one.

Total (Prof) Experience	Select to update the total years of professional experience. If you select this field and leave the **If Employment Date <** field blank, all employees who met the original selection parameters are updated. If you select this field and the **Original Emp Date** or **Latest Re-employ Date** field on the Personnel > Maintenance > Employment Info page is equal to or less than the date entered in the **If Employment Date <** field, the employee data is updated. If the **Original Emp Date** or **Latest Re-employ Date** field on the Personnel > Maintenance > Employment Info page is greater than the date entered in the **If Employment Date <** field, the employee data is not updated.
District (Prof) Experience	Select to update the total years of professional experience in a district. If you select this field and leave the **If Employment Date <** field blank, all employees who met the original selection parameters are updated. If you select this field and the **Original Emp Date** or **Latest Re-employ Date** field on the Personnel > Maintenance > Employment Info page is equal to or less than the date entered in the **If Employment Date <** field, the employee data is updated. If the **Original Emp Date** or **Latest Re-employ Date** field on the Personnel > Maintenance > Employment Info page is greater than the date entered in the **If Employment Date <** field, the employee data is not updated.
Total (Non-Prof) Experience	Select to update the total years of non-professional experience. If you select this field and leave the **If Employment Date <** field blank, all employees who met the original selection parameters are updated. If you select this field and the **Original Emp Date** or **Latest Re-employ Date** field on the Personnel > Maintenance > Employment Info page is equal to or less than the date entered in the **If Employment Date <** field, the employee data is updated. If the **Original Emp Date** or **Latest Re-employ Date** field on the Personnel > Maintenance > Employment Info page is greater than the date entered in the **If Employment Date <** field, the employee data is not updated.

District (Non-Prof) Experience	Select to update the total years of non-professional experience in a district.
	If you select this field and leave the **If Employment Date <** field blank, all employees who met the original selection parameters are updated.
	If you select this field and the **Original Emp Date** or **Latest Re-employ Date** field on the Personnel > Maintenance > Employment Info page is equal to or less than the date entered in the **If Employment Date <** field, the employee data is updated. If the **Original Emp Date** or **Latest Re-employ Date** field on the Personnel > Maintenance > Employment Info page is greater than the date entered in the **If Employment Date <** field, the employee data is not updated.
Prior Teaching Experience	Select to update the number of years of prior teaching experience.
	If you select this field and leave the **If Employment Date <** field blank, all employees who met the original selection parameters are updated.
	If you select this field and the **Original Emp Date** or **Latest Re-employ Date** field on the Personnel > Maintenance > Employment Info page is equal to or less than the date entered in the **If Employment Date <** field, the employee data is updated. If the **Original Emp Date** or **Latest Re-employ Date** field on the Personnel > Maintenance > Employment Info page is greater than the date entered in the **If Employment Date <** field, the employee data is not updated.
	In the **Job Code** field, click ⋮ to select specific job codes where the prior teaching experience should be updated.
	The employees who match the selected parameters and the selected job codes will have their prior teaching experience updated. If an employee has multiple jobs included in the job code selection, their employment record is only updated once.

❑ Under **Modify**, select the employee data to modify:

Area Code	Type the three-digit area code that you wish to modify in the **From** column. In the **To** column, type the new area, or leave blank to clear the previous area code.
Zip Code	Type the five-digit zip code that you wish to modify in the **From** column. In the **To** column, type the new zip code, or leave blank to clear the previous zip code.

❑ Click **Execute** to execute the process. A preview report is displayed. Review the report.

❑ Click **Process** to proceed.

A message is displayed indicating that the process was successfully completed.

❑ Click **Cancel** to return to the Mass Update page.

Other functions and features:

Reset	Click to reset all previously selected parameter options to the default.

Responsibility - HRS3400

Personnel > Utilities > Mass Update > Responsibility

This utility is used to mass update employee responsibility data by copying data from one school year to another. Responsibility data may be updated for a number of employees at a single time or by an individual employee number. Responsibility records with an end date are not included in the process.

Mass update responsibility data:

❏ Under **Parameters**, select the appropriate parameters for the employees whose responsibility data is to be updated.

TIP: Prior to processing a mass update, capture a screenshot of the parameters used for future reference.

Field	Description
Pay Status	This field defaults to **Both** to include both active and inactive groups in the process.
Payroll Freq	This field defaults to *All* to include all pay frequencies in the process.
Extract ID	Click ⌄ to select a locally assigned extract ID used for grouping employees. The ID is used to tag employee records for a batch process (e.g., copy or extract). Each employee must have the Extract ID set in the Employment Info tab before they can be selected using this function.
Employee Nbr	If you want to update data for only one employee, type the employee number, if known. If the employee number is not known or multiple employees are needed, click ⁝ to select employees.

❏ Under **Copy**, in the **School Year** field:

From	Type the school year from which you want to copy responsibility records in the YYYY format.
To	Type the school to which you want to copy responsibility records in the YYYY format.

❏ Click **Execute** to execute the process. A preview report is displayed. The report only lists available responsibilities to be copied based on the set parameters. Duplicates are not allowed. Review the report.

❏ Click **Process** to proceed.

A message is displayed indicating that the process was completed successfully.

❏ Click **Cancel** to return to the Mass Update page. A message is displayed indicating that the process was canceled.

Texas Unique Staff ID Interface

Use the Table of Contents to access a page.

Staff ID Export - HRS8700

Personnel > Utilities > Texas Unique Staff ID Interface > Staff ID Export

This utility is used to export employee demographic information to a file layout that the Texas Education Agency will use to assign a Texas Student Data System (TSDS) unique ID to each employee. Employees in the current and next payroll frequencies (e.g., 4, 5, or 6) who do not have an assigned Texas unique staff ID are exported based on the indicated parameters.

The pay type selection criteria is based on the highest primary job pay frequency with an Active pay status. If the pay status is inactive in all pay frequencies, the criteria will be based on the highest primary job pay frequency with an Inactive pay Status.

Non-employee instructional staff members are included if the **First** and **Last** name, **Sex**, **Date of Birth**, and **SSN** fields are populated, and at least one **Race** is selected on the Maintenance > Non-Employee page in District Administration.

The employee is extracted if the **Original Emp Date** or **Latest Re-Employ Date** is greater than the **Termination Date**.

Effective April 2, 2018, the export file format version was updated from 2.1 to 3.0.

Export staff ID tables:

❏ Under **School Year**:

- The **From** field is preset and is display only.
- In the **To** field, type the four-digit school year.

❏ Click **Execute** to execute the process.

Notes:

- All employees without a Texas Unique Staff ID are exported.
- Pay type 1 employees who do not have a termination date are exported.
- Pay type 1 employees who have a termination date, and the termination date is between 09-01-**<From School Year>** and 08-31-**<To School Year>** are exported.
- Pay type 2 and pay type 3 employees who do not have a termination date and have an employee status of 1, 2, 3, or 8 are exported.
- Pay type 2 and pay type 3 employees who have a termination date, and the termination date is between 09-01-**<From School Year>** and 08-31-**<To School Year>** and have an employee status of 1, 2, 3, or 8 are exported.
- Long term substitutes (pay type = 4 , TRS member position = 02, and employee status = A) are exported.
- When the employee's termination date is not between 09-01-**<From School Year>** and

08-31-**<To School Year>**, and the original employee date or the latest re-employment date is greater than the termination date, the employee is extracted.

The Texas Unique Staff ID Export Report is displayed. Review the report.

❏ Click **Process** to continue the export. Locate and select the folder on your computer or network where you want to save the file and click **Save**.

- A message is displayed indicating that the file was created successfully. Click **OK**.
- Another message is displayed indicating that the process was completed successfully. Click **OK**.

❏ Click **Cancel** to close the report and return to the Staff ID Export tab.

Staff ID Import - HRS8700

Personnel > Utilities > Texas Unique Staff ID Interface > Staff ID Import

This utility is used to import a file that was previously exported on the Staff ID Export page and was processed by the Texas Education Agency (TEA). The file will update the employee's demographic Texas unique staff ID with the TEA employee-assigned Texas Student Data System (TSDS) unique ID.

Non-employee instructional staff members are included if the **First** and **Last** name, **Sex**, **Date of Birth**, and **SSN** fields are populated, and at least one **Race** is selected on the Maintenance > Non-Employee page in District Administration.

Import staff ID tables:

❏ Click **Browse**. A pop-window is displayed.

- Click **Choose File**. Locate and select the file on your computer or network and click **Submit**. The file name is displayed next to **File Name**.
- Click **Cancel** to return to the Staff ID Import tab without selecting a file.

❏ Click **Execute** to execute the process.

The Texas Unique ID Staff Import Report is displayed. Review the report.

❏ Click **Process** to proceed.

A message indicating that the import process completed successfully is displayed. Click **OK**.