

Service Record Checklist

Revised: April 2008

Teacher service records should be created prior to updating the **Years Experience** fields on the Employment Info page for the next school year.

- 1. Verify the employee data is correct:
 - Staff Demo
 - Employee Name
 - Staff Job/Pay Data Employment Info
 - Percent Day Employed
 - Extract ID (if used)
 - Years Experience
 - Grades Taught
 - Note:** The Employment Info tab is shared with next year, and users should not update this information for the new school year until after the Service Record Extract process has been completed.
 - Staff Job/Pay Data Job Info
 - Contract beginning & Ending Dates
 - # of Days Employed
 - State Step
 - Accrual Code
 - Payoff Date
- 2. Verify the District HR Options page has the correct state leave codes.
- 3. Verify all leave has been posted for the school year, and balances are correct.
- 4. Export Human Resources by Payroll.
- 5. Use Extract Teacher Service Record to determine selection criteria and desired format, such as:
 - Payroll frequency
 - Accrual Code
 - Extract ID
 - Employee Nbr
 - Payoff Dates
 - Nbr Days Employed
- 6. Run the extract.
- 7. Verify the extract report displays the correct data for each employee.
- 8. Process the extract.
- 9. Make any necessary manual adjustments in the Staff Demo Service Record tab.
 - Build a record for an employee not included in the extract.
 - Modify extracted data in an employee's record.

- Create an additional record for an employee who held multiple jobs in the school year (e.g., an aide from August through December and a teacher from January through May).

10. Print HRS1400 - Teacher Service Records for those leaving the district.