Personnel: Maintenance

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ACA 1094 YTD Data

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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	In the **All 12 months** field: 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. Select **No** if the employer did not offer the minimum essential coverage for all months in the calendar year. If the employer offered the minimum essential coverage only in certain calendar months, select **Yes** or **No** for the applicable months.
	Full-Time Employee Count for ALE Member	Type the number of full-time employees for each month, but do not count any employee in a Limited Non-Assessment Period. 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.
	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	This column must be completed if **Member of an Aggregated ALE Group** is selected on the ALE Member Information tab. Select **All 12 Months** if the employer was a member of an Aggregated ALE Group for all 12 months of the calendar year. 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.
	Section 4980 Transition Relief Indicator	The **Section 4980H Transition Relief Indicator** column is only enabled if **C** is selected on the ALE Member Information tab. Type one of the following relief codes based on the employer's certification of eligibility. A - If the employer is eligible for the 50 to 99 Relief. B - If the employer is eligible for the 100 or More Relief.
Other ALE Members of Aggregated ALE Group	Enter data in the following fields for ALE members included in the Aggregated ALE Group. A maximum of 30 records can be entered. **Member Name** **Employee Identification Number (EIN)**	

☐ 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. *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

❑ 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	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.
	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
	If the employee received various offers during the calendar year, click ∨ for the individual month(s) and select the received offer of coverage.
	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.
	If the **Offer of Coverage** (line 14) is 1B-1E or 1J-1K, the **Employee Share** (line 15) field is printed.
	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.
	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.
	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.
Employee Share	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.
	1095-C Forms report notes:
	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.
	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.
	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.

Safe Harbor	Click ⌄ to select the Section 4980H safe harbor employer relief code that applied to the employee.
	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.
	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.
	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.
	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.
	1095-C Forms report notes:
	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.
	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.
	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.

❑ 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	Click ⌄ to select one of the following one-character codes indicating the employee's status. This field is required. When extracting for State Reporting, staff records with a pay type of 2 or 3 are extracted if the employee status is *1 - Active professional*, *2 - Active auxiliary per*, *3 - Retired*, or *8 - Temporary*. *0 - Pending* - 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. • *1 - Active professional* • *2 - Active auxillary per* • *3 - Retired* • *4 - Resigned* • *5 - On Leave* • *6 - Substitute* • *7 - Substitute retired* • *8 - Temporary* • *9 - Other* • *A - Long Term Substitute*

❑ Under **Employment Dates**:

Original Emp. Date	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. This field is required to extract the employee for State Reporting. **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.
Latest Re-Employ Date	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.
Termination Date	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. The termination date and reason are used to exclude the employee from TEA reporting.
Extract for TSDS	Select to include the employee in TSDS Staff Domain extracts regardless of their employment status.
Termination Reason	Click ⌄ to select the reason the employee was terminated. The termination reasons are maintained on the Personnel > Tables > Job/Contract > Termination Reason tab.
Eligible for Re-hire	Select if the employee is eligible for rehire.
Percent Day Employed	PEIMS Reporting Element 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. This field is required. 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. **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. 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.

❑ Under **Employment Types**:

Employment Type	Required TRS reporting field. Click ⌄ to select the employee's employment type code. • *F - Half-Time or more* • *M - Temporary* • *P - Less than Half-Time* • *S - Substitute*
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. • *C - Combination of Substitute and Half-Time or less* • *F - Full-Time* • *H - Half-Time or less* • *S - Substitute*
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	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. If the **1095 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 1095. 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 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.

❏ 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, probatory, 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

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~~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	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**.

❑ 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	PEIMS Reporting Element TWEDS Data Element: TEACHER-INCENTIVE-ALLOTMENT-DESIGNATION-CODE (E1722) (Code table: DC165) Click ⌄ to select the appropriate teacher (ROLE-ID 087) allotment code. • *01 Active National Board Certified Teacher* - Indicates that the teacher is an Active National Board Certified Teacher. • *02 Active Teacher Incentive Allotment Designation* - Indicates that the teacher holds a current designation (Recognized, Exemplary, or Master). • *03 LEA Submitted Designation Pending* - 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	PEIMS Reporting Element (if associated with a PEIMS PK Teacher Requirement)) Click ⋮ to select the teaching specialty covered by the certificate.
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)	PEIMS Reporting Element 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. If this field needs to be updated for an existing employee, use the Personnel > Utilities > Change Staff ID utility. Reported to SSA, IRS, and TRS.
Texas Unique Staff ID	PEIMS Reporting Element Type the 10-digit unique staff ID assigned by the Texas Education Agency (TEA). 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. Review the Assign a TSDS Unique ID guide for additional information.

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

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

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

❏ Complete the following employee demographic fields:

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

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	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. 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.).

Allowed work email address domains

Home E-mail	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.

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	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**.

❏ 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

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.

Fields removed for records with a 2025 school year or greater.

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.

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.
Co-op/SSA LEA	
Role ID / Staff Classification	PEIMS Reporting Element 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.
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.
Staff Service	PEIMS Reporting Element Click ⋮ to select the eight-digit code that indicates the services supplied by staff.
Grade Level	PEIMS Reporting Element 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.
Pop Served	PEIMS Reporting Element 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).
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**: • 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.

# of Students	PEIMS Reporting Element 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.
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.

❑ 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	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**.

❑ 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	Type the maximum years of experience for the employee. The field can be a maximum of two digits. 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.
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.
Service End Date	Type the ending date of the contract for the employee in the MMDDYYYY format.

Field	Description
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 *Private* is selected in District Administration, the field defaults to *Private*. If *Independent* or *Charter* are selected, the field defaults to *Public*.

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~~

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