



## Personnel: Reports



# Table of Contents

|   |    |
|---|----|
| <b>Reports</b>  | 1  |
| <b>Payroll Information Reports</b>                              | 2  |
| <b>HRS5250 - 1095-B Forms</b>                                   | 5  |
| <b>HRS5255 - 1095-C Forms</b>                                   | 7  |
| <b>HRS6720 - ACA 1095 YTD Report</b>                            | 9  |
| <b>HRS6600 - Campus Improvement Plan Emp FTE Report</b>         | 10 |
| <b>HRS6500 - Campus Information</b>                             | 12 |
| <b>HRS1250 - Employee Data Listing</b>                          | 13 |
| <b>HRS6550 - Employee Extra Duty Report</b>                     | 15 |
| <b>HRS1450 - Employee Mailing Labels</b>                        | 17 |
| <b>HRS6300 - Employee Permit Data</b>                           | 19 |
| <b>HRS6350 - Employee Responsibility Data</b>                   | 20 |
| <b>HRS1650 - Employee Salary Information</b>                    | 21 |
| <b>HRS6450 - Health Insurance Coverage</b>                      | 23 |
| <b>HRS6700 - Health Insurance Status Report</b>                 | 24 |
| <b>HRS6400 - Salary Verification Report</b>                     | 26 |
| <b>Personnel Reports</b>  | 27 |
| <b>HRS1600 - Certification Report</b>                           | 30 |
| <b>HRS1050 - Employee Birthday List</b>                         | 32 |
| <b>HRS1250 - Employee Data Listing</b>                          | 34 |
| <b>HRS1500 - Employee Education Report</b>                      | 36 |
| <b>HRS1450 - Employee Mailing Labels</b>                        | 37 |
| <b>HRS1650 - Employee Salary Information</b>                    | 39 |
| <b>HRS1100 - Employee Verification Report</b>                   | 41 |
| <b>HRS1200 - Federal EEOC Report</b>                            | 43 |
| <b>HRS1550 - New Hire Report</b>                                | 45 |
| <b>HRS1000 - Roster of Personnel</b>                            | 46 |
| <b>HRS1700 - Social Security Number Verification</b>            | 48 |
| <b>HRS1750 - Teacher Incentive Allotment Designation Report</b> | 49 |
| <b>HRS1400 - Teacher Service Record</b>                         | 50 |
| <b>Self-Service Reports</b>                                     | 52 |
| <b>HRS8000 - Self-Service Requests</b>                          | 55 |
| <b>HRS8900 - Employee Data (ED)</b>                             | 59 |
| <b>HRS8910 - Employment After Retirement (ER)</b>               | 60 |
| <b>HRS4300 - Health Insurance Participation Report</b>          | 61 |
| <b>HRS9800 - Member Data (MD)</b>                               | 63 |
| <b>HRS8905 - Regular Payroll (RP)</b>                           | 64 |
| <b>User Created Reports</b>                                     | 65 |
| <b>User Created Reports - HRS9000</b>                           | 66 |



# Reports

Use the Table of Contents to access a page.

# Payroll Information Reports

## *Personnel > Reports > Payroll Information Reports*

This page allows you to select the report you want to generate.

### Select a report:

All available report names are displayed on the left side of the page. The list of available reports remains displayed on the page even after you select a report name. This allows you to select another report within the selected reports menu without exiting the report page.

☐ Click a report to select it. The parameters for the selected report are displayed on the right side of the page.

☐ Type or select the report options. **Parameters in bold are required.**

☐ Use the buttons located at the top of the page to generate the report. If the button feature does not apply to the selected report, it is disabled. For example, a certain report may not be available in the CSV format, so the **CSV** button will be disabled when that report is selected.

- **Preview** - Click to generate the HTML view of the report.
- **PDF** - Click to generate a PDF file of the report.
- **CSV** - Click to generate a CSV file of the report.
- **Clear Options** - Click to clear data from all parameter fields.

[Review, save and/or print the report.](#)

### Sort and filter:

Some reports may or may not provide the sort and/or filter option.

|  |   |  |  |                                  |  |
|--|---|--|--|----------------------------------|--|
| <b>Sort</b>                                      | <p><a href="#">Sort report data:</a></p> <p>You can sort data to make it easier to review or find records in the reports. Not all reports allow this option.</p> <p>From the report window, click <b>Sort/Filter</b> to open the Sort/Filter window. By default, the <b>Sort Criteria</b> section is expanded. If not, click <b>Sort Criteria</b>.</p> <table border="1" data-bbox="212 309 1479 748"> <tr> <td data-bbox="212 309 518 416"><b>(Left grid) Columns Available for Sorting</b></td><td data-bbox="523 309 1479 456">Select the columns by which you want to sort, the columns are highlighted blue. Click ► to move the selected columns to the right side of under <b>Sort Columns</b>. Continue moving columns to the right grid as needed.</td></tr> <tr> <td data-bbox="212 463 518 528"><b>(Right grid) Sort Columns</b></td><td data-bbox="523 463 1479 748"> <p>You can rearrange the columns to indicate the order in which you want the sort applied. Click a column name, and drag it up or down to a new location.</p> <p>In the right grid, for each column, click to indicate if you want that data sorted in ascending (e.g., A-Z, 0-9) or descending (e.g., Z-A, 9-0) order.</p> <p>To remove a column from the sort, select the column, and then click to move it back to the left grid.</p> </td></tr> </table> <p>Click <b>OK</b> to apply the selected sort criteria to the report.</p> <p>Click <b>Cancel</b> to close the window without re-sorting.</p> | <b>(Left grid) Columns Available for Sorting</b> | Select the columns by which you want to sort, the columns are highlighted blue. Click ► to move the selected columns to the right side of under <b>Sort Columns</b> . Continue moving columns to the right grid as needed. | <b>(Right grid) Sort Columns</b> | <p>You can rearrange the columns to indicate the order in which you want the sort applied. Click a column name, and drag it up or down to a new location.</p> <p>In the right grid, for each column, click to indicate if you want that data sorted in ascending (e.g., A-Z, 0-9) or descending (e.g., Z-A, 9-0) order.</p> <p>To remove a column from the sort, select the column, and then click to move it back to the left grid.</p> |
| <b>(Left grid) Columns Available for Sorting</b> | Select the columns by which you want to sort, the columns are highlighted blue. Click ► to move the selected columns to the right side of under <b>Sort Columns</b> . Continue moving columns to the right grid as needed.  |  |  |                                  |  |
| <b>(Right grid) Sort Columns</b>                 | <p>You can rearrange the columns to indicate the order in which you want the sort applied. Click a column name, and drag it up or down to a new location.</p> <p>In the right grid, for each column, click to indicate if you want that data sorted in ascending (e.g., A-Z, 0-9) or descending (e.g., Z-A, 9-0) order.</p> <p>To remove a column from the sort, select the column, and then click to move it back to the left grid.</p>  |  |  |                                  |  |

|               |  |   |
|---------------|--|---|
| <b>Filter</b> | <b>Filter report data:</b><br>When you want to view only certain data, you may find it useful to filter the report data. You can use specific criteria to retrieve only the data that you want. Not all reports allow this option.<br>From the report window, click <b>Sort/Filter</b> to open the <b>Sort/Filter</b> window. By default, the <b>Sort Criteria</b> section is expanded. Click <b>Filter Criteria</b> to expand the <b>Filter Criteria</b> section.<br>If the report does not allow sorting, the <b>Filter</b> button is displayed instead of the <b>Sort/Filter</b> button, and sort criterion fields are not available.<br>Click <b>Add Criterion</b> to add new filter criteria. A blank row is displayed in the grid. |   |
|               | <b>Field</b>   | <b>Description</b>  |
|               | <b>Column</b>  | Select a column by which to filter the data. The drop down lists the columns that appear on the report.   |
|               | <b>Operator</b>  | Select an operator.<br>= Equals<br>≠ Not equals<br>< Less than<br>≤ Less than or equal to<br>> Greater than<br>≥ Greater than or equal to   |
|               | <b>Value</b>   | Type the value by which you want to filter. For example, if you selected a date in the <b>Column</b> field, type a date to view only data for a specific date.  |
|               | <b>Other functions and features:</b>   |   |
|               | <b>Add Criterion</b>   | <a href="#">Add another row.</a><br>Select the logical connector ( <b>AND</b> or <b>OR</b> ) in the <b>Logical</b> field. Continue adding rows as needed.<br>Using the <b>AND</b> operator limits search results, because the program looks only for records that contain both criterion. Using the <b>OR</b> operator expands search results, because the program looks for records that contain either one criterion or the other, or both. |
|               | <b>Delete Selected</b>   | <a href="#">Delete selected row.</a><br>Select the row, and then click the <b>Delete Selected</b> button. The row is deleted from the filter criteria.  |
|               | <b>Click OK to apply the selected filter criteria to the report.</b><br><b>Click Cancel to close the dialog box without applying a filter.</b>   |   |
|               | <b>Reset</b>   | <a href="#">Reset report data.</a><br>Click to restore the report to the original view, removing all sorting and filtering that has been applied.   |
| <b>Reset</b>  | <a href="#">Reset report data:</a><br>Click to restore the report to the original view, removing all sorting and filtering that has been applied.  |   |



# HRS5250 - 1095-B Forms



## Personnel > Reports > Payroll Information Reports > 1095-B Forms

The report prints 1095-B forms for each employee. It is also used to create an IRS Affordable Care Act (ACA) Information Returns (AIR) .xml file that is saved to a user-defined drive/folder and enables you to file using the electronic file format. Once 1095-B data is verified and completed, the user can create a 1095-B historical file that populates the employee's Maintenance > ACA 1095 YTD > 1095-B Hist tab. The 1095-B historical file data can be updated or changed as often as required by selecting Y for the final run. Changes are added and updated in the 1095-B historical file. Also, a comparison report can be generated, which allows you to verify that every employee with a W-2 for the selected reporting tax year has a 1095.

### Notes:

- The first and middle long name versions are used when extracting employee names for the 1095B Form and AIR File. Per IRS specifications, the names are limited to 20 characters and any excess characters are truncated. The covered individual names are limited as follows: first - 17, middle - 14, and last - 20. Last names that are longer than 20 characters are truncated.
- Per IRS specifications, most special characters are removed from the generated ACA AIR files. [Allowed characters](#)
- All ACA information returns must be filed electronically with the IRS.

| Parameter  | Parameter Description  |
|--|--|
| <b>Comparison Report (C), 1095-B Forms (1), IRS AIR File (2)</b> | C - Create the comparison report.<br><br>1 - Create the 1095-B Form.<br><br>2 - Create the IRS AIR file.<br><br>This is a required field.                            |
| <b>Final Run - Create Historical Record? (Y/N)</b>               | Y - Create the 1095-B historical record on the final run.<br><br>N - Do not create the 1095-B historical record on the final run.<br><br>This is a required field.   |
| <b>Tax Year (####)</b>   | Type the tax year in the YYYY format, which will be included on the report. This is a required field.  |
| <b>Print SSN (S), or Masked SSN (M)</b>                          | S - Print the social security number.<br><br>M - Print the masked social security number.  |
| <b>Sort by Alpha (A), SSN (S), or Pay Campus (C)</b>             | A - Sort the report alphabetically.<br><br>S - Sort the report by social security number.<br><br>C - Sort the report by pay campus.<br><br>This is a required field. |

| Parameter                                      | Parameter Description  |
|--|--|
| <b>Print on Both Sides of Paper? (Y/N)</b>     | Y - Print on both front and back (one page per person).<br>N - Do not print on front and back (three pages per person).  |
| <b>Select Pay Campus(es), or blank for ALL</b> | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for pay campuses. Otherwise, leave blank to use all campus ID numbers. |
| <b>Select Employee(s), or blank for ALL</b>    | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers.   |
| <b>Original (O) or Test (T) File</b>           | O - Create the original file.<br>T - Create a test file.   |
| <b>Prior Year Data? (Y/N)</b>                  | Y - Include prior year data.<br>N - Do not include prior year data.  |

[Generate the report.](#)

# HRS5255 - 1095-C Forms



## Personnel > Reports > Payroll Information Reports > 1095-C Forms

The report prints 1095-C forms for each employee. It can also create an IRS Affordable Care Act (ACA) Information Returns (AIR) .xml file that is saved to a user-defined drive/folder and enables the user to file using the electronic file format. Once 1095-C and/or 1094-C data is verified and completed, the user can create a 1095-C and/or 1094-C historical file, which populates the employee's Maintenance > ACA 1095 YTD Data > 1095-C Hist and Maintenance > ACA 1094 YTD Data > 1094-C Hist tabs. The 1095-C and 1094-C historical file data can be updated or changed as often as required by selecting Y for the final run. Changes are added and updated in the 1095-C and 1094-C historical file. Also, a comparison report can be generated, which allows you to verify that every employee with a W-2 for the selected reporting tax year has a 1095.

### Notes:

- The first and middle long name versions are used when extracting employee names for the 1095C Form and AIR File. Per IRS specifications, the names are limited to 20 characters and any excess characters are truncated. The covered individual names are limited as follows: first - 17, middle - 14, and last - 20. Last names that are longer than 20 characters are truncated.
- Per IRS specifications, most special characters are removed from the generated ACA AIR files. [Allowed characters](#)
- All ACA information returns must be filed electronically with the IRS.

| Parameter   | Parameter Description  |
|---|--|
| <b>Comparison Report (C), 1095-C Form (1), IRS AIR File (2)</b> | C - Create the comparison report.<br><br>1 - Create the 1095-C Form.<br><br>2 - Create the IRS AIR file.<br><br>This is a required field.                            |
| <b>Final Run - Create Historical Record? (Y/N)</b>              | Y - Create the 1095-C historical record on the final run.<br><br>N - Do not create the 1095-C historical record on the final run.<br><br>This is a required field.   |
| <b>Tax Year (####)</b>  | Type the tax year in the YYYY format, which will be included on the report. This is a required field.  |
| <b>Sort by Alpha (A), SSN (S), or Pay Campus (C)</b>            | A - Sort the report alphabetically.<br><br>S - Sort the report by social security number.<br><br>C - Sort the report by pay campus.<br><br>This is a required field. |


| Parameter                                      | Parameter Description  |
|--|--|
| <b>Plan Start Month (01-12)</b>                | Type the two-digit plan start month to be included in the report.<br><br>This is a required field.   |
| <b>Print on Both Sides of Paper? (Y/N)</b>     | Y - Print on both front and back (one page per person).<br><br>N - Do not print on front and back (three pages per person).  |
| <b>Select Pay Campus(es), or blank for ALL</b> | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for pay campuses. Otherwise, leave blank to use all campus ID numbers. |
| <b>Select Employee(s), or blank for ALL</b>    | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers.   |
| <b>Original (O) or Test (T) File</b>           | O - Create the original file.<br><br>T - Create a test file.   |
| <b>Prior Year Data? (Y/N)</b>                  | Y - Include prior year data.<br><br>N - Do not include prior year data.  |

[Generate the report.](#)

# HRS6720 - ACA 1095 YTD Report

## Personnel > Reports > Payroll Information Reports > ACA 1095 YTD Report

The report provides a year-to-date listing of ACA 1095-B (Health Coverage) or 1095-C (Employer-Provided Health Insurance Offer and Coverage) information.







| Parameter  | Parameter Description  |
|--|--|
| <b>1095-B (B) or 1095-C (C)</b>  | B - Include 1095-B data.<br><br>C - Include 1095-C data.<br><br>This is a required field.  |
| <b>Calendar Year</b>   | Type a calendar year in the YYYY format. This is a required field.   |
| <b>Select Employee(s), or blank for ALL</b>  | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers. |
| <b>1095-C - EMP Offer and Coverage (E), Covered Individual (C), or blank for ALL</b> | E - Include employer offers and coverage type on the report.<br><br>C - Include covered individuals on the report.<br><br>Blank - Include employer offers and coverage type, and covered individuals on the report.                                    |


[Generate the report.](#)

# HRS6600 - Campus Improvement Plan Emp FTE Report

**Personnel > Reports > Payroll Information Reports > Campus Improvement Plan Emp FTE Report**

The report identifies all full-time equivalents (FTEs) by fund, campus, and program code. The report can be displayed from either the current or next year payroll frequency.

| Parameter  | Parameter Description  |
|--|--|
| <b>Sort by Alpha (A), or Account Code (C)</b>                | A - Sort the report alphabetically.<br><br>C - Sort the report by account code.<br><br>This is a required field.   |
| <b>Pay Status Active (A), Inactive (I), or blank for ALL</b> | A - Print active employees only.<br><br>I - Print inactive employees only.<br><br>Blank - Print both active and inactive employees.  |
| <b>Pay Type 1-3, or blank for ALL</b>                        | 1-3 - Include employees with a specific pay type (e.g., 1) on the report.<br><br>Blank - Include all employees on the report.  |
| <b>Include Reports (Select From List)</b>                    | Type a Y or an N to include or exclude specific reports (Detail Report, Summary Report) separating each of the reports with a comma and no space (e.g., Y,N). Or, click  to include reports. This is a required field.  |
| <b>Select Fund(s), or blank for ALL</b>                      | Type the three-digit fund code separating multiple fund codes with a comma (e.g., 199, 224). Or, click  to search for funds/years. Otherwise, leave blank to use all fund codes.  |
| <b>Select Function(s), or blank for ALL</b>                  | Type the two-digit function code separating multiple function codes with a comma (e.g., 01, 99). Or, click  to search for functions. Otherwise, leave blank to use all function codes.                                  |
| <b>Select Organization(s), or blank for ALL</b>              | Type the three-digit organization number separating multiple organization numbers with a comma (e.g., 001, 699). Or, click  to search for organization numbers. Otherwise, leave blank to use all organization numbers. |
| <b>Select Program Intent(s), or blank for ALL</b>            | Type the two-digit program intent code separating multiple program intent codes with a comma (e.g., 01, 99). Or, click  to search for program intent codes. Otherwise, leave blank to use all program intent codes.     |
| <b>Select Employee(s), or blank for ALL</b>                  | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers.   |

| Parameter                                      | Parameter Description  |
|--|--|
| <b>Select Frequency(ies), or blank for ALL</b> | Type a one-digit frequency number separating multiple frequency numbers with a comma (e.g., 5, 6). Or, click  to search for payroll frequencies. Otherwise, leave blank to use all payroll frequencies. |

[Generate the report.](#)

# HRS6500 - Campus Information

## ***Personnel > Reports > Payroll Information Reports > Campus Information***

The report lists all campuses in the district. Users can sort the listing by either the campus ID or campus name. Also, they can choose whether the campus address and phone number are also listed.

| Parameter                                     | Parameter Description  |
|---|--|
| <b>Sort by Campus Id (I), Campus Name (N)</b> | I - Sort the report by campus identification number.<br><br>N - Sort the report by campus name.<br><br>This is a required field.   |
| <b>Print Address and Phone Number? (Y/N)</b>  | Y - Print the campus address and phone number on the report.<br><br>N - Do not print the campus address and phone number on the report.<br><br>This is a required field. |



[Generate the report.](#)







# HRS1250 - Employee Data Listing

## Personnel > Reports > Payroll Information Reports > Employee Data Listing

The report is a detailed listing of employee pay and contract information including leave information.

| Parameter   | Parameter Description   |
|---|---|
| <b>Sort by Alpha (A), Pay Campus (C), Primary Campus (P)</b>          | <p>A - Sort the report alphabetically.</p> <p>C - Sort the report by pay campus.</p> <p>P - Sort the report by primary campus.</p> <p>This is a required field.</p>   |
| <b>Include Reports (Select From List)</b>                             | Type a Y or an N to include or exclude specific reports (Federal EEOC Report, Employee Detail Report, Employee Exclusion Report, EEOC Form 168A Report, Create EEOC File) separating each of the five reports with a comma and no space (e.g., Y,Y,N,N,N). Or, click  to <a href="#">include reports</a> . This is a required field. |
| <b>Include SSN on Report? (Y/N)</b>                                   | <p>Y - Include the employee's social security number on the report.</p> <p>N - Do not include the employee's social security number on the report.</p> <p>This is a required field.</p>   |
| <b>Include Number of Days Employed / in Contract on Report? (Y/N)</b> | <p>Y - Include the employee's number of days employed (or in contract) on the report.</p> <p>N - Do not include the employee's number of days employed (or in contract) on the report.</p> <p>This is a required field.</p>   |
| <b>From Last Name (3 letters)</b>                                     | Type the first three-characters of the employee's last name, or leave blank to use all last names and not indicate a starting range.  |
| <b>To Last Name (3 letters)</b>                                       | Type the first three-characters of the employee's last name, or leave blank to use all last names and not indicate an ending range.   |
| <b>Pay Status Active (A), Inactive (I), or blank for ALL</b>          | <p>A - Print active employees only.</p> <p>I - Print inactive employees only.</p> <p>Blank - Print both active and inactive employees.</p>  |
| <b>Pay Type 1-4, or blank for ALL</b>                                 | <p>1-4 - Include employees with a specific pay type (e.g., 1) on the report.</p> <p>Blank - Include all employees on the report.</p>  |
| <b>Select Pay Campus(es), or blank for ALL</b>                        | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for pay campuses. Otherwise, leave blank to use all campus ID numbers.  |





| Parameter  | Parameter Description   |
|--|---|
| <b>Select Primary Campus(es), or blank for ALL</b> | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for primary campuses. Otherwise, leave blank to use all campus ID numbers.          |
| <b>Select Extract ID(s), or blank for ALL</b>      | Type the extract ID, separating multiple extract IDs with a comma (e.g., GO, BUS). Or, click  to search for extract IDs. Otherwise, leave blank to use all extract IDs.  |
| <b>Select Employee(s), or blank for ALL</b>        | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers.  |
| <b>E-mail Subject</b>                              | Type the subject of the e-mail message that will be sent.   |
| <b>E-mail Message</b>                              | Type the e-mail message that will be sent.  |
| <b>From Pay Date (MMDDYYYY), or blank for ALL</b>  | <p>Type the from pay date in the MMDDYYYY format, or leave blank to use all from dates.</p> <p>This parameter is used to limit the employee selection to include only those employees who were paid during the selected pay date range (<b>From</b> and <b>To Pay Date</b>), and not to select data to be included in the report.</p> |
| <b>To Pay Date (MMDDYYYY), or blank for ALL</b>    | <p>Type the to pay date in the MMDDYYYY format, or leave blank to use all to dates.</p> <p>This parameter is used to limit the employee selection to include only those employees who were paid during the selected pay date range (<b>From</b> and <b>To Pay Date</b>), and not to select data to be included in the report.</p>     |
| <b>Select Frequency</b>                            | Type the one-digit pay frequency. Or, click  to select a pay frequency. This is a required field.  |


[Generate the report.](#)

# HRS6550 - Employee Extra Duty Report

## Personnel > Reports > Payroll Information Reports > Employee Extra Duty Report

The report lists all employees with extra duty codes on the Pay Info tab. The report can be sorted by name, campus, or extra duty code. The **Include Distribution Account Codes** parameter allows you to include S-type distributions for selected employees.

| Parameter   | Parameter Description  |
|---|--|
| <b>Sort by Alpha (A), Pay Campus (C), Primary Campus (P), Extra Duty Code (E)</b> | <p>A - Sort the report alphabetically.</p> <p>C - Sort the report by pay campus.</p> <p>P - Sort the report by primary campus.</p> <p>E - Sort the report by extra duty code.</p> <p>This is a required field.</p>   |
| <b>Include Distribution Account Codes? (Y/N)</b>                                  | <p>Y - Include the distribution account codes on the report.</p> <p>N - Do not include the distribution account codes on the report.</p> <p>This is a required field.</p>  |
| <b>Pay Status Active (A), Inactive (I), or blank for ALL</b>                      | <p>A - Print active employees only.</p> <p>I - Print inactive employees only.</p> <p>Blank - Print both active and inactive employees.</p>   |
| <b>Pay Type 1-4, Exclude Subs (E), or blank for ALL</b>                           | <p>1-4 - Include employees with a specific pay type (e.g., 1) on the report.</p> <p>E - Exclude substitute employees from the report.</p> <p>Blank - Include all employees on the report.</p>  |
| <b>Select Pay Campus(es), or blank for ALL</b>                                    | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for pay campuses. Otherwise, leave blank to use all campus ID numbers.     |
| <b>Select Primary Campus(es), or blank for ALL</b>                                | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for primary campuses. Otherwise, leave blank to use all campus ID numbers. |
| <b>Select Extra Duty Code(s), or blank for ALL</b>                                | Type the two-digit extra duty code, including all leading zeros and separating multiple extra duty codes with a comma (e.g., 01, 08). Or, click  to search for extra duty codes. Otherwise, leave blank to use all extra duty codes.        |
| <b>Select Employee(s), or blank for ALL</b>                                       | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers.   |

| Parameter  | Parameter Description  |
|--|--|
| <b>Page Break on Extra Duty Code (Y/N) (Required when selecting Sort by Extra Duty Code)</b> | <p>Y - Include a page break between each extra duty code.</p> <p>N - Do not include a page break between each extra duty code.</p> <p>This is a required field when the Sort by Alpha (A), Pay Campus (C), Primary Campus (P), Extra Duty Code (E) report parameter is set to E.</p> |
| <b>Select Frequency</b>  | Type the one-digit pay frequency. Or, click  to select a pay frequency. This is a required field.   |

[Generate the report.](#)





# HRS1450 - Employee Mailing Labels

## Personnel > Reports > Payroll Information Reports > Employee Mailing Labels

The report prints address labels to attach to envelopes for mass or individual mailing. Any compatible label can be used.

- Avery 6194 labels are 12 per page and are 1.5" x 4".
- Avery 5962 labels are 14 per page and are 1.3" x 4". You can also use 5162, 5262, and 5662.
- Avery 5160 labels are 30 per page and are 1" x 2.63". You can also use 5260. Avery 5660 labels are clear, laser labels with 30 per page.

| Parameter   | Parameter Description   |
|---|---|
| <b>Sort by Alpha (A), Pay Campus (C), Primary Campus (P)</b>            | <p>A - Sort the report alphabetically.</p> <p>C - Sort the report by pay campus.</p> <p>P - Sort the report by primary campus.</p> <p>This is a required field.</p>   |
| <b>Select Restriction Local (L), Public (P), or No restrictions (N)</b> | <p>L - Do not include information that is restricted from local view on the report.</p> <p>P - Do not include information that is restricted from public view on the report. This option is the most restrictive.</p> <p>N - Print the report without restricting any information.</p> <p>This is a required field.</p> |
| <b>Print address? (Y/N)</b>   | <p>Y - Print the address on the report.</p> <p>N - Do not print the address on the report.</p> <p>This is a required field.</p>   |
| <b>Labels Per Page (12, 14 or 30)</b>                                   | <p>12 - Print 12 labels per page.</p> <p>14 - Print 14 labels per page.</p> <p>30 - Print 30 labels per page.</p> <p>This is a required field.</p>  |
| <b>Pay Status Active (A), Inactive (I), or blank for ALL</b>            | <p>A - Print active employees only.</p> <p>I - Print inactive employees only.</p> <p>Blank - Print both active and inactive employees.</p>  |





| Parameter   | Parameter Description  |
|---|--|
| <b>Pay Type 1-4, Exclude Subs (E), or blank for ALL</b> | <p>1-4 - Include employees with a specific pay type (e.g., 1) on the report.</p> <p>E - Exclude substitute employees from the report.</p> <p>Blank - Include all employees on the report.</p>  |
| <b>Select Pay Campus(es), or blank for ALL</b>          | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for pay campuses. Otherwise, leave blank to use all campus ID numbers.     |
| <b>Select Primary Campus(es), or blank for ALL</b>      | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for primary campuses. Otherwise, leave blank to use all campus ID numbers. |
| <b>Select Employee(s), or blank for ALL</b>             | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers.   |
| <b>Select Frequency</b>                                 | Type the one-digit pay frequency. Or, click  to select a pay frequency. This is a required field.   |

[Generate the report.](#)

# HRS6300 - Employee Permit Data

## Personnel > Reports > Payroll Information Reports > Employee Permit Data

The report provides a printout of the permit data entered for employees. Use the report to verify the data before a PEIMS submission. Employees are not included on the report unless permit data exists for the employee.





| Parameter  | Parameter Description  |
|--|--|
| <b>Sort by Alpha (A), Pay Campus (C), Primary Campus (P)</b> | <p>A - Sort the report alphabetically.</p> <p>C - Sort the report by pay campus.</p> <p>P - Sort the report by primary campus.</p> <p>This is a required field.</p>  |
| <b>Pay Status Active (A), Inactive (I), or blank for ALL</b> | <p>A - Print active employees only.</p> <p>I - Print inactive employees only.</p> <p>Blank - Print both active and inactive employees.</p>   |
| <b>Pay Type 1-4, or blank for ALL</b>                        | <p>1-4 - Include employees with a specific pay type (e.g., 1) on the report.</p> <p>Blank - Include all employees on the report.</p>   |
| <b>Select Pay Campus(es), or blank for ALL</b>               | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for pay campuses. Otherwise, leave blank to use all campus ID numbers.     |
| <b>Select Primary Campus(es), or blank for ALL</b>           | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for primary campuses. Otherwise, leave blank to use all campus ID numbers. |
| <b>Select Employee(s), or blank for ALL</b>                  | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers.   |
| <b>Select Frequency</b>                                      | Type the one-digit pay frequency. Or, click  to select a pay frequency. This is a required field.   |

[Generate the report.](#)

# HRS6350 - Employee Responsibility Data

## Personnel > Reports > Payroll Information Reports > Employee Responsibility Data

The report provides a printout of the responsibility data entered for employees. Use the report to verify the data before a PEIMS submission.

| Parameter   | Parameter Description  |
|---|--|
| <b>Sort by Alpha (A), Pay Campus (C), Primary Campus (P), Role ID (R)</b> | <p>A - Sort the report alphabetically.</p> <p>C - Sort the report by pay campus.</p> <p>P - Sort the report by primary campus.</p> <p>R - Sort the report by role identification number.</p> <p>This is a required field.</p>  |
| <b>Pay Status Active (A), Inactive (I), or blank for ALL</b>              | <p>A - Print active employees only.</p> <p>I - Print inactive employees only.</p> <p>Blank - Print both active and inactive employees.</p>   |
| <b>Pay Type 1-4, or blank for ALL</b>                                     | <p>1-4 - Include employees with a specific pay type (e.g., 1) on the report.</p> <p>Blank - Include all employees on the report.</p>   |
| <b>Primary Job (P), or blank for ALL</b>                                  | <p>P - Include only the primary job on the report.</p> <p>Blank - Include all jobs on the report.</p>  |
| <b>Select Pay Campus(es), or blank for ALL</b>                            | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for pay campuses. Otherwise, leave blank to use all campus ID numbers.                             |
| <b>Select Primary Campus(es), or blank for ALL</b>                        | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for primary campuses. Otherwise, leave blank to use all campus ID numbers.                         |
| <b>Select Employee(s), or blank for ALL</b>                               | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers.   |
| <b>Select Role ID(s), or blank for ALL</b>                                | Type the three-digit role identification number, including all leading zeros and separating multiple role identification numbers with a comma (e.g., 000, 071). Or, click  to search for role IDs. Otherwise, leave blank to use all role identification numbers. |

[Generate the report.](#)









# HRS1650 - Employee Salary Information

## Personnel > Reports > Payroll Information Reports > Employee Salary Information

The report lists employee personal, salary, and emergency contact information. A parameter is available to customize the signature statement for all employees on the report.

**Note:** The pay step and pay schedule are not included in the report if a job's salary concept is set to midpoint.

| Parameter   | Parameter Description   |
|---|---|
| <b>Sort by Alpha (A), Pay Campus (C), Primary Campus (P)</b>          | <p>A - Sort the report alphabetically.</p> <p>C - Sort the report by pay campus.</p> <p>P - Sort the report by primary campus.</p> <p>This is a required field.</p>   |
| <b>Include Reports (Select From List)</b>                             | <p>Type a Y or an N to include or exclude specific reports (Emergency Contact, Job, Budget, Salary, Miscellaneous Pay, XTRA Duty, Deduction, Leave, Specialty Area, Bank) separating each of the ten reports with a comma and no space (e.g., Y,Y,N,N,N,Y,Y,N,N,N). Or, click  to <a href="#">include reports</a>. This is a required field.</p> |
| <b>Include SSN on Report? (Y/N)</b>                                   | <p>Y - Include the employee's social security number on the report.</p> <p>N - Do not include the employee's social security number on the report.</p> <p>This is a required field.</p>   |
| <b>Include Number of Days Employed / in Contract on Report? (Y/N)</b> | <p>Y - Include the employee's number of days employed (or in contract) on the report.</p> <p>N - Do not include the employee's number of days employed (or in contract) on the report.</p> <p>This is a required field.</p>   |
| <b>Print Signature Statement - New (1), Original (2), or None(3)</b>  | <p>1 - Print the new signature statement on the report, which is based on the <b>Enter New Signature Statement</b> report parameter.</p> <p>2 - Print the original signature statement on the report.</p> <p>3 - Do not print the signature statement on the report.</p> <p>This is a required field.</p>   |
| <b>Enter New Signature Statement</b>                                  | <p>Type the signature statement to display on the report. This signature statement will only display when the <b>Print Signature Statement - New (1), Original (2) or None(3)</b> report parameter is set to 1.</p>   |





| Parameter  | Parameter Description  |
|--|--|
| <b>Pay Status Active (A), Inactive (I), or blank for ALL</b> | <p>A - Print active employees only.</p> <p>I - Print inactive employees only.</p> <p>Blank - Print both active and inactive employees.</p>   |
| <b>Pay Type 1-4, Exclude Subs (E), or blank for ALL</b>      | <p>1-4 - Include employees with a specific pay type (e.g., 1) on the report.</p> <p>E - Exclude substitute employees from the report.</p> <p>Blank - Include all employees on the report.</p>  |
| <b>Select Pay Campus(es), or blank for ALL</b>               | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for pay campuses. Otherwise, leave blank to use all campus ID numbers.     |
| <b>Select Primary Campus(es), or blank for ALL</b>           | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for primary campuses. Otherwise, leave blank to use all campus ID numbers. |
| <b>Select Extract ID(s), or blank for ALL</b>                | Type the extract ID, separating multiple extract IDs with a comma (e.g., GO, BUS). Or, click  to search for extract IDs. Otherwise, leave blank to use all extract IDs.   |
| <b>Select Employee(s), or blank for ALL</b>                  | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers.   |
| <b>E-mail Subject</b>  | Type the subject of the e-mail message that will be sent.  |
| <b>E-mail Message</b>  | Type the e-mail message that will be sent.   |
| <b>Select Frequency</b>                                      | Type the one-digit pay frequency. Or, click  to select a pay frequency. This is a required field.   |

[Generate the report.](#)

# HRS6450 - Health Insurance Coverage

## Personnel > Reports > Payroll Information Reports > Health Insurance Coverage

The report identifies all employees enrolled in the health insurance program(s), district and member contributions, and payment dates to the insurer.




| Parameter   | Parameter Description  |
|---|--|
| <b>Sort by Alpha (A), Pay Campus (C), Primary Campus (P), Insurance Company Code(I)</b> | <p>A - Sort the report alphabetically.</p> <p>C - Sort the report by pay campus.</p> <p>P - Sort the report by primary campus.</p> <p>I - Sort the report by insurance company code.</p> <p>This is a required field.</p>  |
| <b>Pay Status Active (A), Inactive (I), or blank for ALL</b>                            | <p>A - Print active employees only.</p> <p>I - Print inactive employees only.</p> <p>Blank - Print both active and inactive employees.</p>   |
| <b>Pay Type 1-4, Exclude Subs (E), or blank for ALL</b>                                 | <p>1-4 - Include employees with a specific pay type (e.g., 1) on the report.</p> <p>E - Exclude substitute employees from the report.</p> <p>Blank - Include all employees on the report.</p>  |
| <b>Select Pay Campus(es), or blank for ALL</b>  | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for pay campuses. Otherwise, leave blank to use all campus ID numbers.     |
| <b>Select Primary Campus(es), or blank for ALL</b>                                      | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for primary campuses. Otherwise, leave blank to use all campus ID numbers. |
| <b>Select Employee(s), or blank for ALL</b>   | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers.   |
| <b>From Coverage Date (MMDDYYYY), or blank for ALL</b>                                  | Type the date from which coverage began in the MMDDYYYY format, or leave blank to use all from dates.  |
| <b>To Coverage Date (MMDDYYYY), or blank for ALL</b>                                    | Type the date to which coverage ended in the MMDDYYYY format, or leave blank to use all to dates.  |
| <b>Select Frequency</b>   | Type the one-digit pay frequency. Or, click  to select a pay frequency. This is a required field.   |


[Generate the report.](#)

# HRS6700 - Health Insurance Status Report

## Personnel > Reports > Payroll Information Reports > Health Insurance Status Report

The report provides a listing of the employer's health insurance offer dates and the employee's response to each offer.

| Parameter   | Parameter Description  |
|---|--|
| <b>Sort by Alpha (A), Pay Campus (C), Primary Campus (P)</b>  | <p>A - Sort the report alphabetically.</p> <p>C - Sort the report by pay campus.</p> <p>P - Sort the report by primary campus.</p> <p>This is a required field.</p>  |
| <b>Pay Status Active (A), Inactive (I), or blank for ALL</b>  | <p>A - Print active employees only.</p> <p>I - Print inactive employees only.</p> <p>Blank - Print both active and inactive employees.</p>   |
| <b>Pay Type 1-4, Exclude Subs (E), or blank for ALL</b>       | <p>1-4 - Include employees with a specific pay type (e.g., 1) on the report.</p> <p>E - Exclude substitute employees from the report.</p> <p>Blank - Include all employees on the report.</p>  |
| <b>Select Pay Campus(es), or blank for ALL</b>                | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for pay campuses. Otherwise, leave blank to use all campus ID numbers.     |
| <b>Select Primary Campus(es), or blank for ALL</b>            | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for primary campuses. Otherwise, leave blank to use all campus ID numbers. |
| <b>Select Employee(s), or blank for ALL</b>                   | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers.   |
| <b>From Offer Date (MMDDYYYY), or blank for ALL</b>           | Type the from offer date in the MMDDYYYY format, or leave blank to use all from dates.   |
| <b>To Offer Date (MMDDYYYY), or blank for ALL</b>             | Type the to offer date in the MMDDYYYY format, or leave blank to use all to dates.   |
| <b>Action Status Accept (A), Reject (R), or blank for ALL</b> | <p>A - Include employees who accepted the health insurance offer.</p> <p>R - Include employees who rejected the health insurance offer.</p> <p>Blank - Include employees who accepted and rejected the health insurance offer.</p>   |






| Parameter        | Parameter Description  |
|------------------|--|
| Select Frequency | Type the one-digit pay frequency. Or, click  to select a pay frequency. This is a required field. |

[Generate the report.](#)

# HRS6400 - Salary Verification Report

## Personnel > Reports > Payroll Information Reports > Salary Verification Report

The report is used to verify that next year salary calculations have been run correctly before moving next year's files to current.

| Parameter  | Parameter Description  |
|--|--|
| <b>Sort by Alpha (A), Pay Campus (C), Primary Campus (P)</b> | <p>A - Sort the report alphabetically.</p> <p>C - Sort the report by pay campus.</p> <p>P - Sort the report by primary campus.</p> <p>This is a required field.</p>  |
| <b>Print Distribution Information? (Y/N)</b>                 | <p>Y - Include distribution information on the report.</p> <p>N - Do not include distribution information on the report.</p> <p>This is a required field.</p>  |
| <b>Pay Status Active (A), Inactive (I), or blank for ALL</b> | <p>A - Print active employees only.</p> <p>I - Print inactive employees only.</p> <p>Blank - Print both active and inactive employees.</p>   |
| <b>Pay Type 1-4, Exclude Subs (E), or blank for ALL</b>      | <p>1-4 - Include employees with a specific pay type (e.g., 1) on the report.</p> <p>E - Exclude substitute employees from the report.</p> <p>Blank - Include all employees on the report.</p>  |
| <b>Select Pay Campus(es), or blank for ALL</b>               | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for pay campuses. Otherwise, leave blank to use all campus ID numbers.     |
| <b>Select Primary Campus(es), or blank for ALL</b>           | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for primary campuses. Otherwise, leave blank to use all campus ID numbers. |
| <b>Select Extract ID(s), or blank for ALL</b>                | Type the extract ID, separating multiple extract IDs with a comma (e.g., GO, BUS). Or, click  to search for extract IDs. Otherwise, leave blank to use all extract IDs.   |
| <b>Select Employee(s), or blank for ALL</b>                  | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers.   |
| <b>Select Frequency</b>                                      | Type the one-digit pay frequency. Or, click  to select a pay frequency. This is a required field.   |

[Generate the report.](#)

# Personnel Reports

## *Personnel > Reports > Personnel Reports*

This page allows you to select the report you want to generate.

## Select a report:

All available report names are displayed on the left side of the page. The list of available reports remains displayed on the page even after you select a report name. This allows you to select another report within the selected reports menu without exiting the report page.

☐ Click a report to select it. The parameters for the selected report are displayed on the right side of the page.

☐ Type or select the report options. **Parameters in bold are required.**

☐ Use the buttons located at the top of the page to generate the report. If the button feature does not apply to the selected report, it is disabled. For example, a certain report may not be available in the CSV format, so the **CSV** button will be disabled when that report is selected.

- **Preview** - Click to generate the HTML view of the report.
- **PDF** - Click to generate a PDF file of the report.
- **CSV** - Click to generate a CSV file of the report.
- **Clear Options** - Click to clear data from all parameter fields.

[Review, save and/or print the report.](#)

## Sort and filter:

Some reports may or may not provide the sort and/or filter option.

|  |   |  |  |                                  |  |
|--|---|--|--|----------------------------------|--|
| <b>Sort</b>                                      | <p><a href="#">Sort report data:</a></p> <p>You can sort data to make it easier to review or find records in the reports. Not all reports allow this option.</p> <p>From the report window, click <b>Sort/Filter</b> to open the Sort/Filter window. By default, the <b>Sort Criteria</b> section is expanded. If not, click <b>Sort Criteria</b>.</p> <table border="1" data-bbox="212 309 1479 748"> <tr> <td data-bbox="212 309 518 416"><b>(Left grid) Columns Available for Sorting</b></td><td data-bbox="518 309 1479 456">Select the columns by which you want to sort, the columns are highlighted blue. Click ► to move the selected columns to the right side of under <b>Sort Columns</b>. Continue moving columns to the right grid as needed.</td></tr> <tr> <td data-bbox="212 456 518 748"><b>(Right grid) Sort Columns</b></td><td data-bbox="518 456 1479 748"> <p>You can rearrange the columns to indicate the order in which you want the sort applied. Click a column name, and drag it up or down to a new location.</p> <p>In the right grid, for each column, click to indicate if you want that data sorted in ascending (e.g., A-Z, 0-9) or descending (e.g., Z-A, 9-0) order.</p> <p>To remove a column from the sort, select the column, and then click to move it back to the left grid.</p> </td></tr> </table> <p>Click <b>OK</b> to apply the selected sort criteria to the report.</p> <p>Click <b>Cancel</b> to close the window without re-sorting.</p> | <b>(Left grid) Columns Available for Sorting</b> | Select the columns by which you want to sort, the columns are highlighted blue. Click ► to move the selected columns to the right side of under <b>Sort Columns</b> . Continue moving columns to the right grid as needed. | <b>(Right grid) Sort Columns</b> | <p>You can rearrange the columns to indicate the order in which you want the sort applied. Click a column name, and drag it up or down to a new location.</p> <p>In the right grid, for each column, click to indicate if you want that data sorted in ascending (e.g., A-Z, 0-9) or descending (e.g., Z-A, 9-0) order.</p> <p>To remove a column from the sort, select the column, and then click to move it back to the left grid.</p> |
| <b>(Left grid) Columns Available for Sorting</b> | Select the columns by which you want to sort, the columns are highlighted blue. Click ► to move the selected columns to the right side of under <b>Sort Columns</b> . Continue moving columns to the right grid as needed.  |  |  |                                  |  |
| <b>(Right grid) Sort Columns</b>                 | <p>You can rearrange the columns to indicate the order in which you want the sort applied. Click a column name, and drag it up or down to a new location.</p> <p>In the right grid, for each column, click to indicate if you want that data sorted in ascending (e.g., A-Z, 0-9) or descending (e.g., Z-A, 9-0) order.</p> <p>To remove a column from the sort, select the column, and then click to move it back to the left grid.</p>  |  |  |                                  |  |










|               |  |   |
|---------------|--|---|
| <b>Filter</b> | <b>Filter report data:</b><br>When you want to view only certain data, you may find it useful to filter the report data. You can use specific criteria to retrieve only the data that you want. Not all reports allow this option.<br>From the report window, click <b>Sort/Filter</b> to open the <b>Sort/Filter</b> window. By default, the <b>Sort Criteria</b> section is expanded. Click <b>Filter Criteria</b> to expand the <b>Filter Criteria</b> section.<br>If the report does not allow sorting, the <b>Filter</b> button is displayed instead of the <b>Sort/Filter</b> button, and sort criterion fields are not available.<br>Click <b>Add Criterion</b> to add new filter criteria. A blank row is displayed in the grid. |   |
|               | <b>Field</b>   | <b>Description</b>  |
|               | <b>Column</b>  | Select a column by which to filter the data. The drop down lists the columns that appear on the report.   |
|               | <b>Operator</b>  | Select an operator.<br>= Equals<br>≠ Not equals<br>< Less than<br>≤ Less than or equal to<br>> Greater than<br>≥ Greater than or equal to   |
|               | <b>Value</b>   | Type the value by which you want to filter. For example, if you selected a date in the <b>Column</b> field, type a date to view only data for a specific date.  |
|               | <b>Other functions and features:</b>   |   |
|               | <b>Add Criterion</b>   | <a href="#">Add another row.</a><br>Select the logical connector ( <b>AND</b> or <b>OR</b> ) in the <b>Logical</b> field. Continue adding rows as needed.<br>Using the <b>AND</b> operator limits search results, because the program looks only for records that contain both criterion. Using the <b>OR</b> operator expands search results, because the program looks for records that contain either one criterion or the other, or both. |
|               | <b>Delete Selected</b>   | <a href="#">Delete selected row.</a><br>Select the row, and then click the <b>Delete Selected</b> button. The row is deleted from the filter criteria.  |
|               | <b>Click OK to apply the selected filter criteria to the report.</b><br><b>Click Cancel to close the dialog box without applying a filter.</b>   |   |
|               | <b>Reset</b>   | <a href="#">Reset report data.</a><br>Click to restore the report to the original view, removing all sorting and filtering that has been applied.   |
| <b>Reset</b>  | <b>Reset report data:</b><br>Click to restore the report to the original view, removing all sorting and filtering that has been applied.   |   |

# HRS1600 - Certification Report

## Personnel > Reports > Personnel Reports > Certification Report

The report lists the employee certification and special credential information that was entered on the [Personnel > Maintenance > Staff Demographic > Credentials](#) tab.

| Parameter   | Parameter Description  |
|---|--|
| <b>Sort by Alpha (A), Pay Campus (C), Primary Campus (P), Cert Date (D), Cert Date Expire (E)</b> | <p>A - Sort the report alphabetically.</p> <p>C - Sort the report by pay campus.</p> <p>P - Sort the report by primary campus.</p> <p>D - Sort the report by certification date.</p> <p>E - Sort the report by certification expiration date.</p> <p>This is a required field.</p>   |
| <b>Pay Status Active (A), Inactive (I), or blank for ALL</b>                                      | <p>A - Print active employees only.</p> <p>I - Print inactive employees only.</p> <p>Blank - Print both active and inactive employees.</p>   |
| <b>Pay Type 1-4, Exclude Subs (E), or blank for ALL</b>   | <p>1-4 - Include employees with a specific pay type (e.g., 1) on the report.</p> <p>E - Exclude substitute employees from the report.</p> <p>Blank - Include all employees on the report.</p>  |
| <b>Select Pay Campus(es), or blank for ALL</b>  | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for pay campuses. Otherwise, leave blank to use all campus ID numbers.     |
| <b>Select Primary Campus(es), or blank for ALL</b>  | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for primary campuses. Otherwise, leave blank to use all campus ID numbers. |
| <b>Select Employee(s), or blank for ALL</b>   | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers.   |
| <b>Select Certification Type, or blank for ALL</b>  | Type the one-character certification type code separating multiple certification type codes with a comma (e.g., 2, M). Or, click  to search for certification types. Otherwise, leave blank to use all certification types.                 |
| <b>Select Specialty Area, or blank for ALL</b>  | Type the two-character specialty area separating multiple specialty areas with a comma (e.g., 03, 1V). Or, click  to search for specialty areas. Otherwise, leave blank to use all specialty areas.   |




| Parameter  | Parameter Description   |
|--|---|
| <b>Select Teaching Specialization, or blank for ALL</b>            | Type the two-digit teaching specialization code separating multiple teaching specialization codes with a comma (e.g., 03, 15). Or, click  to search for teaching specializations. Otherwise, leave blank to use all teaching specialization codes. |
| <b>From Certification Date (MMDDYYYY), or blank for ALL</b>        | Type the from certification date in the MMDDYYYY format, or leave blank to use all from dates.  |
| <b>To Certification Date (MMDDYYYY), or blank for ALL</b>          | Type the to certification date in the MMDDYYYY format, or leave blank to use all to dates.  |
| <b>From Certification Date Expire (MMDDYYYY), or blank for ALL</b> | Type the from certification expiration date in the MMDDYYYY format, or leave blank to use all from dates.   |
| <b>To Certification Date Expire (MMDDYYYY), or blank for ALL</b>   | Type the to certification expiration date in the MMDDYYYY format, or leave blank to use all to dates.   |
| <b>Select From Years Taught, or blank for ALL</b>                  | Type a starting teaching year in the YYYY format, or leave blank to use all from years.   |
| <b>Select To Years Taught, or blank for ALL</b>                    | Type an ending teaching year in the YYYY format, or leave blank to use all to years.  |
| <b>Select Frequency</b>  | Type the one-digit pay frequency. Or, click  to select a pay frequency. This is a required field.  |


[Generate the report.](#)

# HRS1050 - Employee Birthday List

## Personnel > Reports > Personnel Reports > Employee Birthday List

The report provides a list of all employee birthdays along with employee number and primary campus. You may choose to include the year in the date of birth and print the report for a particular month.

| Parameter   | Parameter Description  |
|---|--|
| <b>Sort by Alpha (A), Pay Campus (C), Primary Campus (P), Birthday Date (D)</b> | <p>A - Sort the report alphabetically.</p> <p>C - Sort the report by pay campus.</p> <p>P - Sort the report by primary campus.</p> <p>D - Sort the report by birth date.</p> <p>This is a required field.</p>  |
| <b>Include Year in DOB? (Y/N)</b>   | <p>Y - Include the employee's birth year on the report.</p> <p>N - Do not include the employee's birth year on the report.</p> <p>This is a required field.</p>  |
| <b>Pay Status Active (A), Inactive (I), or blank for ALL</b>                    | <p>A - Print active employees only.</p> <p>I - Print inactive employees only.</p> <p>Blank - Print both active and inactive employees.</p>   |
| <b>Pay Type 1-4, Exclude Subs (E), or blank for ALL</b>                         | <p>1-4 - Include employees with a specific pay type (e.g., 1) on the report.</p> <p>E - Exclude substitute employees from the report.</p> <p>Blank - Include all employees on the report.</p>  |
| <b>Individual Month (01 to 12), or blank for ALL</b>                            | <p>01-12 - Include a specific month (e.g., 08 indicates August) on the report.</p> <p>Blank - Include all months on the report.</p>  |
| <b>Select Pay Campus(es), or blank for ALL</b>                                  | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for pay campuses. Otherwise, leave blank to use all campus ID numbers.     |
| <b>Select Primary Campus(es), or blank for ALL</b>                              | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for primary campuses. Otherwise, leave blank to use all campus ID numbers. |
| <b>Select Employee(s), or blank for ALL</b>                                     | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers.   |

| Parameter        | Parameter Description  |
|------------------|--|
| Select Frequency | Type the one-digit pay frequency. Or, click  to select a pay frequency. This is a required field. |


[Generate the report.](#)






# HRS1250 - Employee Data Listing

## Personnel > Reports > Personnel Reports > Employee Data Listing

The report is a detailed listing of employee pay and contract information including leave information.

If the calendar year is greater than 2013, the non-TRS nontax business allowance and non-TRS nontax nonpay business allowance amounts are not included in the taxable gross calculations.

| Parameter   | Parameter Description   |
|---|---|
| <b>Sort by Alpha (A), Pay Campus (C), Primary Campus (P)</b>          | <p>A - Sort the report alphabetically.</p> <p>C - Sort the report by pay campus.</p> <p>P - Sort the report by primary campus.</p> <p>This is a required field.</p>   |
| <b>Include Reports (Select From List)</b>                             | <p>Type a Y or an N to include or exclude specific reports (Federal EEOC Report, Employee Detail Report, Employee Exclusion Report, EEOC Form 168A Report, Create EEOC File) separating each of the five reports with a comma and no space (e.g., Y,Y,N,N,N). Or, click  to <a href="#">include reports</a>. This is a required field.</p> |
| <b>Include SSN on Report? (Y/N)</b>                                   | <p>Y - Include the employee's social security number on the report.</p> <p>N - Do not include the employee's social security number on the report.</p> <p>This is a required field.</p>   |
| <b>Include Number of Days Employed / in Contract on Report? (Y/N)</b> | <p>Y - Include the employee's number of days employed (or in contract) on the report.</p> <p>N - Do not include the employee's number of days employed (or in contract) on the report.</p> <p>This is a required field.</p>   |
| <b>From Last Name (3 letters)</b>                                     | Type the first three-characters of the employee's last name, or leave blank to use all last names and not indicate a starting range.  |
| <b>To Last Name (3 letters)</b>                                       | Type the first three-characters of the employee's last name, or leave blank to use all last names and not indicate an ending range.   |
| <b>Pay Status Active (A), Inactive (I), or blank for ALL</b>          | <p>A - Print active employees only.</p> <p>I - Print inactive employees only.</p> <p>Blank - Print both active and inactive employees.</p>  |
| <b>Pay Type 1-4, or blank for ALL</b>                                 | <p>1-4 - Include employees with a specific pay type (e.g., 1) on the report.</p> <p>Blank - Include all employees on the report.</p>  |

| Parameter  | Parameter Description  |
|--|--|
| <b>Select Pay Campus(es), or blank for ALL</b>     | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for pay campuses. Otherwise, leave blank to use all campus ID numbers.     |
| <b>Select Primary Campus(es), or blank for ALL</b> | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for primary campuses. Otherwise, leave blank to use all campus ID numbers. |
| <b>Select Extract ID(s), or blank for ALL</b>      | Type the extract ID, separating multiple extract IDs with a comma (e.g., GO, BUS). Or, click  to search for extract IDs. Otherwise, leave blank to use all extract IDs.   |
| <b>Select Employee(s), or blank for ALL</b>        | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers.   |
| <b>E-mail Subject</b>                              | Type the subject of the e-mail message that will be sent.  |
| <b>E-mail Message</b>                              | Type the e-mail message that will be sent.   |
| <b>From Pay Date (MMDDYYYY), or blank for ALL</b>  | Type the from pay date in the MMDDYYYY format, or leave blank to use all from dates.   |
| <b>To Pay Date (MMDDYYYY), or blank for ALL</b>    | Type the to pay date in the MMDDYYYY format, or leave blank to use all to dates.   |
| <b>Select Frequency</b>                            | Type the one-digit pay frequency. Or, click  to select a pay frequency. This is a required field.   |





[Generate the report.](#)

# HRS1500 - Employee Education Report

## Personnel > Reports > Personnel Reports > Employee Education Report

The report is used to verify employee education information that was entered on the [Personnel > Maintenance > Staff Demographic > Credentials](#) tab.

An asterisk (\*) is displayed next to employees who are inactive on both pay frequencies. If an employee is active on one frequency and inactive on another frequency, no asterisk is displayed. Any employee who has an active status in any frequency only shows as active on this report. If an employee is inactive on one frequency and active on another frequency and has a different primary and/or pay campus for each frequency (depending on the parameters used), the employee is displayed on the active campus.

| Parameter  | Parameter Description  |
|--|--|
| <b>Sort by Alpha (A), Pay Campus (C), Primary Campus (P)</b> | A - Sort the report alphabetically.<br>C - Sort the report by pay campus.<br>P - Sort the report by primary campus.<br>This is a required field.   |
| <b>Pay Status Active (A), Inactive (I), or blank for ALL</b> | A - Print active employees only.<br>I - Print inactive employees only.<br>Blank - Print both active and inactive employees.  |
| <b>Pay Type 1-4, Exclude Subs (E), or blank for ALL</b>      | 1-4 - Include employees with a specific pay type (e.g., 1) on the report.<br>E - Exclude substitute employees from the report.<br>Blank - Include all employees on the report.   |
| <b>Select Pay Campus(es), or blank for ALL</b>               | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for pay campuses. Otherwise, leave blank to use all campus ID numbers.     |
| <b>Select Primary Campus(es), or blank for ALL</b>           | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for primary campuses. Otherwise, leave blank to use all campus ID numbers. |
| <b>Select Employee(s), or blank for ALL</b>                  | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers.   |
| <b>Select Frequency</b>                                      | Type the one-digit pay frequency. Or, click  to select a pay frequency. This is a required field.   |

[Generate the report.](#)







# HRS1450 - Employee Mailing Labels

## Personnel > Reports > Personnel Reports > Employee Mailing Labels

The report prints address labels to attach to envelopes for mass or individual mailing. Any compatible label can be used.

- Avery 6194 labels are 12 per page and are 1.5" x 4".
- Avery 5962 labels are 14 per page and are 1.3" x 4". You can also use 5162, 5262, and 5662.
- Avery 5160 labels are 30 per page and are 1" x 2.63". You can also use 5260. Avery 5660 labels are clear, laser labels with 30 per page.

| Parameter   | Parameter Description   |
|---|---|
| <b>Sort by Alpha (A), Pay Campus (C), Primary Campus (P)</b>            | <p>A - Sort the report alphabetically.</p> <p>C - Sort the report by pay campus.</p> <p>P - Sort the report by primary campus.</p> <p>This is a required field.</p>   |
| <b>Select Restriction Local (L), Public (P), or No restrictions (N)</b> | <p>L - Do not include information that is restricted from local view on the report.</p> <p>P - Do not include information that is restricted from public view on the report. This option is the most restrictive.</p> <p>N - Print the report without restricting any information.</p> <p>This is a required field.</p> |
| <b>Print address? (Y/N)</b>   | <p>Y - Print the address on the report.</p> <p>N - Do not print the address on the report.</p> <p>This is a required field.</p>   |
| <b>Labels Per Page (12, 14 or 30)</b>                                   | <p>12 - Print 12 labels per page.</p> <p>14 - Print 14 labels per page.</p> <p>30 - Print 30 labels per page.</p> <p>This is a required field.</p>  |
| <b>Pay Status Active (A), Inactive (I), or blank for ALL</b>            | <p>A - Print active employees only.</p> <p>I - Print inactive employees only.</p> <p>Blank - Print both active and inactive employees.</p>  |

| Parameter   | Parameter Description  |
|---|--|
| <b>Pay Type 1-4, Exclude Subs (E), or blank for ALL</b> | <p>1-4 - Include employees with a specific pay type (e.g., 1) on the report.</p> <p>E - Exclude substitute employees from the report.</p> <p>Blank - Include all employees on the report.</p>  |
| <b>Select Pay Campus(es), or blank for ALL</b>          | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for pay campuses. Otherwise, leave blank to use all campus ID numbers.     |
| <b>Select Primary Campus(es), or blank for ALL</b>      | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for primary campuses. Otherwise, leave blank to use all campus ID numbers. |
| <b>Select Employee(s), or blank for ALL</b>             | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers.   |
| <b>Select Frequency</b>                                 | Type the one-digit pay frequency. Or, click  to select a pay frequency. This is a required field.   |


[Generate the report.](#)






# HRS1650 - Employee Salary Information

## Personnel > Reports > Personnel Reports > Employee Salary Information

The report lists employee personal, salary, and emergency contact information. A parameter is available to customize the signature statement for all employees on the report.

**Note:** The pay step and pay schedule are not included on the report if a job's salary concept is set to midpoint.

| Parameter   | Parameter Description   |
|---|---|
| <b>Sort by Alpha (A), Pay Campus (C), Primary Campus (P)</b>          | <p>A - Sort the report alphabetically.</p> <p>C - Sort the report by pay campus.</p> <p>P - Sort the report by primary campus.</p> <p>This is a required field.</p>   |
| <b>Include Reports (Select From List)</b>                             | <p>Type a Y or an N to include or exclude specific reports (Emergency Contact, Job, Budget, Salary, Miscellaneous Pay, XTRA Duty, Deduction, Leave, Specialty Area, Bank) separating each of the ten reports with a comma and no space (e.g., Y,Y,N,N,N,Y,Y,N,N,N). Or, click  to <a href="#">include reports</a>. This is a required field.</p> |
| <b>Include SSN on Report? (Y/N)</b>                                   | <p>Y - Include the employee's social security number on the report.</p> <p>N - Do not include the employee's social security number on the report.</p> <p>This is a required field.</p>   |
| <b>Include Number of Days Employed / in Contract on Report? (Y/N)</b> | <p>Y - Include the employee's number of days employed (or in contract) on the report.</p> <p>N - Do not include the employee's number of days employed (or in contract) on the report.</p> <p>This is a required field.</p>   |
| <b>Print Signature Statement - New (1), Original (2), or None(3)</b>  | <p>1 - Print the new signature statement on the report, which is based on the <b>Enter New Signature Statement</b> report parameter.</p> <p>2 - Print the original signature statement on the report.</p> <p>3 - Do not print the signature statement on the report.</p> <p>This is a required field.</p>   |
| <b>Enter New Signature Statement</b>                                  | <p>Type the signature statement to display on the report. This signature statement will only display when the <b>Print Signature Statement - New (1), Original (2) or None(3)</b> report parameter is set to 1.</p>   |




| Parameter  | Parameter Description  |
|--|--|
| <b>Pay Status Active (A), Inactive (I), or blank for ALL</b> | <p>A - Print active employees only.</p> <p>I - Print inactive employees only.</p> <p>Blank - Print both active and inactive employees.</p>   |
| <b>Pay Type 1-4, Exclude Subs (E), or blank for ALL</b>      | <p>1-4 - Include employees with a specific pay type (e.g., 1) on the report.</p> <p>E - Exclude substitute employees from the report.</p> <p>Blank - Include all employees on the report.</p>  |
| <b>Select Pay Campus(es), or blank for ALL</b>               | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for pay campuses. Otherwise, leave blank to use all campus ID numbers.     |
| <b>Select Primary Campus(es), or blank for ALL</b>           | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for primary campuses. Otherwise, leave blank to use all campus ID numbers. |
| <b>Select Extract ID(s), or blank for ALL</b>                | Type the extract ID, separating multiple extract IDs with a comma (e.g., GO, BUS). Or, click  to search for extract IDs. Otherwise, leave blank to use all extract IDs.   |
| <b>Select Employee(s), or blank for ALL</b>                  | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers.   |
| <b>E-mail Subject</b>  | Type the subject of the e-mail message that will be sent.  |
| <b>E-mail Message</b>  | Type the e-mail message that will be sent.   |
| <b>Select Frequency</b>                                      | Type the one-digit pay frequency. Or, click  to select a pay frequency. This is a required field.   |



[Generate the report.](#)

# HRS1100 - Employee Verification Report

## Personnel > Reports > Personnel Reports > Employee Verification Report

The report provides detailed employee data such as employment dates, salary, address, and other information for reference or to verify recent input and processing.

| Parameter   | Parameter Description  |
|---|--|
| <b>Sort by Alpha (A), Pay Campus (C), Primary Campus (P)</b>            | <p>A - Sort the report alphabetically.</p> <p>C - Sort the report by pay campus.</p> <p>P - Sort the report by primary campus.</p> <p>This is a required field.</p>  |
| <b>Select Restriction Local (L), Public (P), or No restrictions (N)</b> | <p>L - Do not include information that is restricted from local view on the report.</p> <p>P - Do not include information that is restricted from public view on the report. This option is the most restrictive.</p> <p>N - Print the report without restricting any information.</p> <p>This is a required field.</p>        |
| <b>Primary Job (P), or blank for ALL</b>                                | <p>P - Include only the employee's primary job on the report.</p> <p>Blank - Include all jobs on the report.</p>   |
| <b>Pay Status Active (A), Inactive (I), or blank for ALL</b>            | <p>A - Print active employees only.</p> <p>I - Print inactive employees only.</p> <p>Blank - Print both active and inactive employees.</p>   |
| <b>Pay Type 1-4, Exclude Subs (E), or blank for ALL</b>                 | <p>1-4 - Include employees with a specific pay type (e.g., 1) on the report.</p> <p>E - Exclude substitute employees from the report.</p> <p>Blank - Include all employees on the report.</p>  |
| <b>Select Pay Campus(es), or blank for ALL</b>                          | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for pay campuses. Otherwise, leave blank to use all campus ID numbers.     |
| <b>Select Primary Campus(es), or blank for ALL</b>                      | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for primary campuses. Otherwise, leave blank to use all campus ID numbers. |
| <b>Select Extract ID(s), or blank for ALL</b>                           | Type the extract ID, separating multiple extract IDs with a comma (e.g., GO, BUS). Or, click  to search for extract IDs. Otherwise, leave blank to use all extract IDs.   |

| Parameter                                   | Parameter Description  |
|---|--|
| <b>Select Employee(s), or blank for ALL</b> | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers. |
| <b>Select Frequency</b>                     | Type the one-digit pay frequency. Or, click  to select a pay frequency. This is a required field.   |






[Generate the report.](#)

# HRS1200 - Federal EEOC Report

## Personnel > Reports > Personnel Reports > Federal EEOC Report

The report prints the information required for reporting to the Equal Employment Opportunity Commission. It can report active and/or inactive employees and can be sorted by alpha or by campus.

For further information, reference the [Federal EEOC Report Overview](#).

| Parameter  | Parameter Description  |
|--|--|
| <b>Sort by Alpha (A), Pay Campus (C), Primary Campus (P)</b> | <p>A - Sort the report alphabetically.</p> <p>C - Sort the report by pay campus.</p> <p>P - Sort the report by primary campus.</p> <p>This is a required field.</p>  |
| <b>Include Reports (Select From List)</b>                    | Type a Y or an N to include or exclude specific reports (Federal EEOC Report, Employee Detail Report, Employee Exclusion Report, EEOC Form 168A Report, Create EEOC File) separating each of the five reports with a comma and no space (e.g., Y,Y,N,N,N). Or, click  to include reports. This is a required field. |
| <b>Pay Status Active (A), Inactive (I), or blank for ALL</b> | <p>A - Print active employees only.</p> <p>I - Print inactive employees only.</p> <p>Blank - Print both active and inactive employees.</p>   |
| <b>Pay Type 1-4, Exclude Subs (E), or blank for ALL</b>      | <p>1-4 - Include employees with a specific pay type (e.g., 1) on the report.</p> <p>E - Exclude substitute employees from the report.</p> <p>Blank - Include all employees on the report.</p>  |
| <b>Select Frequency(ies), or blank for ALL</b>               | Type a one-digit frequency number separating multiple frequency numbers with a comma (e.g., 5, 6). Or, click  to search for payroll frequencies. Otherwise, leave blank to use all payroll frequencies.   |
| <b>Select Pay Campus(es), or blank for ALL</b>               | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for pay campuses. Otherwise, leave blank to use all campus ID numbers.   |
| <b>Select Primary Campus(es), or blank for ALL</b>           | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for primary campuses. Otherwise, leave blank to use all campus ID numbers.   |
| <b>Select Employee(s), or blank for ALL</b>                  | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers.   |

| Parameter                        | Parameter Description   |
|----------------------------------|---|
| <b>Office of School Number</b>   | Type a seven-digit number to filter the report. The ID is received from the Equal Employment Opportunities Commission once you register on their website.   |
| <b>County Name</b>               | Type the county name, which will be included in the export file.  |
| <b>Total Schools (#####)</b>     | Type the total number of schools, which will be included in the export file. This field can be a maximum of eight digits.   |
| <b>Number of Annexes (#####)</b> | Type the number of annexes, which will be included in the export file. This field can be a maximum of eight digits.   |
| <b>Enrollment (#####)</b>        | Type the number of students enrolled, which will be included in the export file. This field can be a maximum of eight digits.   |
| <b>Authority Withheld</b>        | Type a Y or an N. The National Center for Education Statistics will publish information appearing in Part II, column A of the report unless the district specifically withholds authority to do so. To withhold this authority, type a Y. |
| <b>Phone Number</b>              | Type a contact number to be included on the last page of the report.  |
| <b>Responsible Person Name</b>   | Type a contact name to be included on the last page of the report.  |


[Generate the report.](#)



# HRS1550 - New Hire Report

## Personnel > Reports > Personnel Reports > New Hire Report

The report and the associated file that can be created are used to report new hires to the Office of the Attorney General of Texas. The report lists employees whose employment dates fall between the user-provided beginning and ending dates. The **From Employment Date** is required. When the user clicks **Exception**, all employees whose information is incomplete and could not be included in the file are displayed (e.g., part of address missing). The file that is created by this report can be uploaded to the Office of the Attorney General of Texas. For additional information, go to the Office of the Attorney General of Texas website at <https://portal.cs.oag.state.tx.us/wps/portal/NewHiresReportingMethods>.

| Parameter  | Parameter Description  |
|--|--|
| <b>From Employment Date (MMDDYYYY)</b>                 | Type the from employment date in the MMDDYYYY format. This is a required field.  |
| <b>To Employment Date (MMDDYYYY), or blank for ALL</b> | Type the to employment date in the MMDDYYYY format, or leave blank to use all to dates.  |
| <b>Include SSN on Report? (Y/N)</b>                    | Y - Include the employee's social security number on the report.<br><br>N - Do not include the employee's social security number on the report.<br><br>This is a required field.   |
| <b>Select Employee(s), or blank for ALL</b>            | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers. |

☐ Click **Preview** to view the New Hire Report.


☐ Click **Create File** to generate the EINnhMMDDYYYY.txt file (where EIN is the **District Federal ID Number** on the [Finance > Tables > District Finance Options > Finance Options](#) tab, nh is new hire, and MMDDYYYY is the current system date).





[Generate the report.](#)

# HRS1000 - Roster of Personnel

## Personnel > Reports > Personnel Reports > Roster of Personnel

This report provides a list of district employees (active and inactive) and is used to verify that employee information is correct after any changes or additions are made.

| Parameter   | Parameter Description   |
|---|---|
| <b>Sort by Alpha (A), Pay Campus (C), Primary Campus (P)</b>            | <p>A - Sort the report alphabetically.</p> <p>C - Sort the report by pay campus.</p> <p>P - Sort the report by primary campus.</p> <p>This is a required field.</p>   |
| <b>Print Address Primary (P), Alternate (A)</b>                         | <p>P - Print the employee's primary address on the report.</p> <p>A - Print the employee's alternate address on the report.</p> <p>This is a required field.</p>  |
| <b>Select Restriction Local (L), Public (P), or No restrictions (N)</b> | <p>L - Do not include information that is restricted from local view on the report.</p> <p>P - Do not include information that is restricted from public view on the report. This option is the most restrictive.</p> <p>N - Print the report without restricting any information.</p> <p>This is a required field.</p>           |
| <b>Include Primary Job Code? (Y/N)</b>                                  | <p>Y - Include the employee's primary job code on the report.</p> <p>N - Do not include the employee's primary job code on the report.</p> <p>This is a required field.</p>   |
| <b>Pay Status Active (A), Inactive (I), or blank for ALL</b>            | <p>A - Print active employees only.</p> <p>I - Print inactive employees only.</p> <p>Blank - Print both active and inactive employees.</p> <p>This field is required.</p>   |
| <b>Pay Type 1-4, Exclude Subs (E), or blank for ALL</b>                 | <p>1-4 - Include employees with a specific pay type (e.g., 1) on the report.</p> <p>E - Exclude substitute employees from the report.</p> <p>Blank - Include all employees on the report.</p>   |
| <b>Select Pay Campus(es), or blank for ALL</b>                          | <p>Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for pay campuses. Otherwise, leave blank to use all campus ID numbers.</p> |


| Parameter  | Parameter Description  |
|--|--|
| <b>Select Primary Campus(es), or blank for ALL</b> | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for primary campuses. Otherwise, leave blank to use all campus ID numbers. |
| <b>Select Extract ID(s), or blank for ALL</b>      | Type the extract ID, separating multiple extract IDs with a comma (e.g., GO, BUS). Or, click  to search for extract IDs. Otherwise, leave blank to use all extract IDs.   |
| <b>Select Employee(s), or blank for ALL</b>        | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers.   |
| <b>Select Frequency</b>                            | Type the one-digit pay frequency. Or, click  to select a pay frequency. This is a required field.   |

[Generate the report.](#)

# HRS1700 - Social Security Number Verification

## ***Personnel > Reports > Personnel Reports > Social Security Number Verification***

The report lists the employee number, the staff ID, the employee name, and the hire date. A file may be created from this report to be sent to SSA. Once the report is displayed, the user can click **Exception** to display all employees whose information is incomplete and could not be included in the file (e.g., part of name missing).





| Parameter  | Parameter Description  |
|--|--|
| <b>From Employment Date (MMDDYYYY)</b>                 | Type the from employment date in the MMDDYYYY format. This is a required field.  |
| <b>To Employment Date (MMDDYYYY), or blank for ALL</b> | Type the to employment date in the MMDDYYYY format, or leave blank to use all to dates.  |
| <b>Include SSN on Report? (Y/N)</b>                    | Y - Include the employee's social security number on the report.<br><br>N - Do not include the employee's social security number on the report.<br><br>This is a required field.   |
| <b>Select Employee(s), or blank for ALL</b>            | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers. |

[Generate the report.](#)

# HRS1750 - Teacher Incentive Allotment Designation Report

## Personnel > Reports > Personnel Reports > Teacher Incentive Allotment Designation Report

This report provides a list of employees with their Teacher Incentive Allotment Designation codes and descriptions.

| Parameter  | Parameter Description  |
|--|--|
| <b>Sort by Alpha (A), Pay Campus (C), Primary Campus (P)</b> | <p>A - Sort the report alphabetically.</p> <p>C - Sort the report by pay campus.</p> <p>P - Sort the report by primary campus.</p> <p>This is a required field.</p>  |
| <b>Pay Status Active (A), Inactive (I), or blank for ALL</b> | <p>A - Print active employees only.</p> <p>I - Print inactive employees only.</p> <p>Blank - Print both active and inactive employees.</p> <p>This field is required.</p>  |
| <b>Pay Type 1-4, Exclude Subs (E), or blank for ALL</b>      | <p>1-4 - Include employees with a specific pay type (e.g., 1) on the report.</p> <p>E - Exclude substitute employees from the report.</p> <p>Blank - Include all employees on the report.</p>  |
| <b>Select Pay Campus(es), or blank for ALL</b>               | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for pay campuses. Otherwise, leave blank to use all campus ID numbers.     |
| <b>Select Primary Campus(es), or blank for ALL</b>           | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for primary campuses. Otherwise, leave blank to use all campus ID numbers. |
| <b>Select Employee(s), or blank for ALL</b>                  | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers.   |
| <b>Select Frequency</b>                                      | Type the one-digit pay frequency. Or, click  to select a pay frequency. This is a required field.   |

[Generate the report.](#)







# HRS1400 - Teacher Service Record

## Personnel > Reports > Personnel Reports > Teacher Service Record

The report prints a record for all years of service for a selected employee or all employees.

**Note:** Employee social security numbers are no longer displayed on the report, and have been replaced by the employee's Texas unique staff ID. If the employee does not have a Texas unique staff ID, then "UID not on file" is displayed on the error report.

| Parameter  | Parameter Description   |
|--|---|
| <b>Sort by Alpha (A), Pay Campus (C), Primary Campus (P)</b> | <p>A - Sort the report alphabetically.</p> <p>C - Sort the report by pay campus.</p> <p>P - Sort the report by primary campus.</p> <p>This is a required field.</p>     |
| <b>Pay Status Active (A), Inactive (I), or blank for ALL</b> | <p>A - Print active employees only.</p> <p>I - Print inactive employees only.</p> <p>Blank - Print both active and inactive employees.</p>                              |
| <b>Pay Type 1-4, or blank for ALL</b>                        | <p>1-4 - Include employees with a specific pay type (e.g., 1) on the report.</p> <p>Blank - Include all employees on the report.</p>                                    |
| <b>Pay Step</b>  | Type a two-digit pay step (e.g., 02). Otherwise, leave blank to include all pay steps.  |
| <b>School Year (YYYY), or blank for ALL</b>                  | Type a school year in YYYY format. Otherwise, leave blank to include all school years.  |
| <b>County</b>  | Type the county name to be included for each employee on the report. Otherwise, leave blank to not include a county name in the <b>County</b> field on the report.      |
| <b>Sort School Year Ascending or Descending? (A/D)</b>       | <p>A - Sort the school years in ascending order on the report.</p> <p>D - Sort the school years in descending order on the report.</p> <p>This is a required field.</p> |
| <b>Print Landscape? (Y/N)</b>                                | <p>Y - Print the report in landscape orientation.</p> <p>N - Print the report in portrait orientation.</p> <p>This is a required field.</p>                             |
| <b>Expand Header? (Y/N)</b>                                  | <p>Y - Expand the report header.</p> <p>N - Do not expand the report header.</p> <p>This is a required field.</p>   |

| Parameter  | Parameter Description  |
|--|--|
| <b>Enter Optional Typewritten Title</b>                | Type a signature title using a maximum of 60 alphanumeric characters. This is optional and is displayed under the Authorized Signature on the printed service record.  |
| <b>Service Begin Date (MMDDYYYY), or blank for ALL</b> | Type the starting service date in the MMDDYYYY format, or leave blank to use all starting dates.   |
| <b>Service End Date (MMDDYYYY), or blank for ALL</b>   | Type the ending service date in the MMDDYYYY format, or leave blank to use all ending dates.   |
| <b>Select Accrual Code(s), or blank for ALL</b>        | Type the one-character accrual code separating multiple accrual codes with a comma (e.g., A, D). Or, click  to search for accrual codes. Otherwise, leave blank to use all accrual codes.   |
| <b>Select Pay Campus(es), or blank for ALL</b>         | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for pay campuses. Otherwise, leave blank to use all campus ID numbers.   |
| <b>Select Primary Campus(es), or blank for ALL</b>     | Type the three-digit campus ID number, including all leading zeros and separating multiple campus ID numbers with a comma (e.g., 001, 098). Or, click  to search for primary campuses. Otherwise, leave blank to use all campus ID numbers.   |
| <b>Select Extract(s), or blank for ALL</b>             | Type the extract ID, separating multiple extract IDs with a comma (e.g., GO, BUS). Or, click  to search for extract IDs. Otherwise, leave blank to use all extract IDs.  |
| <b>Select Employee(s), or blank for ALL</b>            | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers.   |
| <b>Include All Service Records (Y,N)</b>               | <p>Y - Include all service records on the report. This will include any service record years that exceed the range as set in the <b>Service Begin Date (MMDDYYYY), or blank for ALL</b> and <b>Service End Date (MMDDYYYY), or blank for ALL</b> report parameters.</p> <p>N - Do not include all service records on the report. Only the service records as set in the <b>Service Begin Date (MMDDYYYY), or blank for ALL</b> and <b>Service End Date (MMDDYYYY), or blank for ALL</b> report parameters will be included on the report.</p> <p>This is a required field.</p> |
| <b>Select Frequency</b>                                | Type the one-digit pay frequency. Or, click  to select a pay frequency. This is a required field.   |

[Generate the report.](#)

# Self-Service Reports

## *Personnel > Reports > Self-Service Reports*

This page allows you to select the report you want to generate.

### Select a report:

All available report names are displayed on the left side of the page. The list of available reports remains displayed on the page even after you select a report name. This allows you to select another report within the selected reports menu without exiting the report page.

☐ Click a report to select it. The parameters for the selected report are displayed on the right side of the page.

☐ Type or select the report options. **Parameters in bold are required.**

☐ Use the buttons located at the top of the page to generate the report. If the button feature does not apply to the selected report, it is disabled. For example, a certain report may not be available in the CSV format, so the **CSV** button will be disabled when that report is selected.

- **Preview** - Click to generate the HTML view of the report.
- **PDF** - Click to generate a PDF file of the report.
- **CSV** - Click to generate a CSV file of the report.
- **Clear Options** - Click to clear data from all parameter fields.

[Review, save and/or print the report.](#)

### Sort and filter:

Some reports may or may not provide the sort and/or filter option.





|             |   |  |
|-------------|---|--|
| <b>Sort</b> | <p><b>Sort report data:</b></p> <p>You can sort data to make it easier to review or find records in the reports. Not all reports allow this option.</p> <p>From the report window, click <b>Sort/Filter</b> to open the Sort/Filter window. By default, the <b>Sort Criteria</b> section is expanded. If not, click <b>Sort Criteria</b>.</p> |  |
|             | <b>(Left grid) Columns Available for Sorting</b>  | Select the columns by which you want to sort, the columns are highlighted blue. Click ► to move the selected columns to the right side of under <b>Sort Columns</b> . Continue moving columns to the right grid as needed.   |
|             | <b>(Right grid) Sort Columns</b>  | <p>You can rearrange the columns to indicate the order in which you want the sort applied. Click a column name, and drag it up or down to a new location.</p> <p>In the right grid, for each column, click to indicate if you want that data sorted in ascending (e.g., A-Z, 0-9) or descending (e.g., Z-A, 9-0) order.</p> <p>To remove a column from the sort, select the column, and then click to move it back to the left grid.</p> |
|             | <p>Click <b>OK</b> to apply the selected sort criteria to the report.</p> <p>Click <b>Cancel</b> to close the window without re-sorting.</p>  |  |

|               |  |   |
|---------------|--|---|
| <b>Filter</b> | <b>Filter report data:</b><br>When you want to view only certain data, you may find it useful to filter the report data. You can use specific criteria to retrieve only the data that you want. Not all reports allow this option.<br>From the report window, click <b>Sort/Filter</b> to open the <b>Sort/Filter</b> window. By default, the <b>Sort Criteria</b> section is expanded. Click <b>Filter Criteria</b> to expand the <b>Filter Criteria</b> section.<br>If the report does not allow sorting, the <b>Filter</b> button is displayed instead of the <b>Sort/Filter</b> button, and sort criterion fields are not available.<br>Click <b>Add Criterion</b> to add new filter criteria. A blank row is displayed in the grid. |   |
|               | <b>Field</b>   | <b>Description</b>  |
|               | <b>Column</b>  | Select a column by which to filter the data. The drop down lists the columns that appear on the report.   |
|               | <b>Operator</b>  | Select an operator.<br>= Equals<br>≠ Not equals<br>< Less than<br>≤ Less than or equal to<br>> Greater than<br>≥ Greater than or equal to   |
|               | <b>Value</b>   | Type the value by which you want to filter. For example, if you selected a date in the <b>Column</b> field, type a date to view only data for a specific date.  |
|               | <b>Other functions and features:</b>   |   |
|               | <b>Add Criterion</b>   | <a href="#">Add another row.</a><br>Select the logical connector ( <i>AND</i> or <i>OR</i> ) in the <b>Logical</b> field. Continue adding rows as needed.<br>Using the <i>AND</i> operator limits search results, because the program looks only for records that contain both criterion. Using the <i>OR</i> operator expands search results, because the program looks for records that contain either one criterion or the other, or both. |
|               | <b>Delete Selected</b>   | <a href="#">Delete selected row.</a><br>Select the row, and then click the <b>Delete Selected</b> button. The row is deleted from the filter criteria.  |
|               | <b>Click OK to apply the selected filter criteria to the report.</b><br><b>Click Cancel to close the dialog box without applying a filter.</b>   |   |
|               | <b>Reset</b>   | <a href="#">Reset report data.</a><br>Click to restore the report to the original view, removing all sorting and filtering that has been applied.   |
| <b>Reset</b>  | <b>Reset report data:</b><br>Click to restore the report to the original view, removing all sorting and filtering that has been applied.   |   |

# HRS8000 - Self-Service Requests

## Personnel > Reports > Self-Service Reports > Self-Service Requests

The report prints pending or processed self-service requests.

| Parameter   | Parameter Description   |
|---|---|
| <b>Select Employee(s), or blank for ALL</b>                     | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers.    |
| <b>Select Approver, or blank for ALL</b>                        | Type the approver name. Or, click  to search for approvers. Otherwise, leave blank to use all approvers.   |
| <b>Report Type Pending (A), Processed (B), or blank for ALL</b> | <p>A - Include only pending requests on the report.</p> <p>B - Include only processed requests on the report.</p> <p>Blank - Include both pending and processed requests on the report.</p>   |
| <b>From Process Date (MMDDYYYY), or blank for ALL</b>           | Type the begin date for the processed requests report in the MMDDYYYY format. Otherwise, leave blank to use all process dates. This field is ignored if the <b>Report Type Pending (A), Processed (B), or blank for ALL</b> report parameter is set to A. |
| <b>To Process Date (MMDDYYYY), or blank for ALL</b>             | Type the end date for the processed requests report in the MMDDYYYY format. Otherwise, leave blank to use all process dates. This field is ignored if the <b>Report Type Pending (A), Processed (B), or blank for ALL</b> report parameter is set to A.   |
| <b>Sort by Alpha (A), Campus (C), Request Date (D)</b>          | <p>A - Sort the report alphabetically by employee name.</p> <p>C - Sort the report by campus, and then by employee name.</p> <p>D - Sort the report by request date.</p> <p>This is a required field.</p>   |

[Generate the report.](#)

# TRS Reports

## *Personnel > Reports > TRS Reports*

This page allows you to select the report you want to generate.

### Select a report:

All available report names are displayed on the left side of the page. The list of available reports remains displayed on the page even after you select a report name. This allows you to select another report within the selected reports menu without exiting the report page.

☐ Click a report to select it. The parameters for the selected report are displayed on the right side of the page.

☐ Type or select the report options. **Parameters in bold are required.**

☐ Use the buttons located at the top of the page to generate the report. If the button feature does not apply to the selected report, it is disabled. For example, a certain report may not be available in the CSV format, so the **CSV** button will be disabled when that report is selected.

- **Preview** - Click to generate the HTML view of the report.
- **PDF** - Click to generate a PDF file of the report.
- **CSV** - Click to generate a CSV file of the report.
- **Clear Options** - Click to clear data from all parameter fields.

[Review, save and/or print the report.](#)

### Sort and filter:

Some reports may or may not provide the sort and/or filter option.

|  |   |  |  |                                  |  |
|--|---|--|--|----------------------------------|--|
| <b>Sort</b>                                      | <p><a href="#">Sort report data:</a></p> <p>You can sort data to make it easier to review or find records in the reports. Not all reports allow this option.</p> <p>From the report window, click <b>Sort/Filter</b> to open the Sort/Filter window. By default, the <b>Sort Criteria</b> section is expanded. If not, click <b>Sort Criteria</b>.</p> <table border="1" data-bbox="212 309 1479 748"> <tr> <td data-bbox="212 309 518 416"><b>(Left grid) Columns Available for Sorting</b></td><td data-bbox="518 309 1479 456">Select the columns by which you want to sort, the columns are highlighted blue. Click ► to move the selected columns to the right side of under <b>Sort Columns</b>. Continue moving columns to the right grid as needed.</td></tr> <tr> <td data-bbox="212 456 518 748"><b>(Right grid) Sort Columns</b></td><td data-bbox="518 456 1479 748"> <p>You can rearrange the columns to indicate the order in which you want the sort applied. Click a column name, and drag it up or down to a new location.</p> <p>In the right grid, for each column, click to indicate if you want that data sorted in ascending (e.g., A-Z, 0-9) or descending (e.g., Z-A, 9-0) order.</p> <p>To remove a column from the sort, select the column, and then click to move it back to the left grid.</p> </td></tr> </table> <p>Click <b>OK</b> to apply the selected sort criteria to the report.</p> <p>Click <b>Cancel</b> to close the window without re-sorting.</p> | <b>(Left grid) Columns Available for Sorting</b> | Select the columns by which you want to sort, the columns are highlighted blue. Click ► to move the selected columns to the right side of under <b>Sort Columns</b> . Continue moving columns to the right grid as needed. | <b>(Right grid) Sort Columns</b> | <p>You can rearrange the columns to indicate the order in which you want the sort applied. Click a column name, and drag it up or down to a new location.</p> <p>In the right grid, for each column, click to indicate if you want that data sorted in ascending (e.g., A-Z, 0-9) or descending (e.g., Z-A, 9-0) order.</p> <p>To remove a column from the sort, select the column, and then click to move it back to the left grid.</p> |
| <b>(Left grid) Columns Available for Sorting</b> | Select the columns by which you want to sort, the columns are highlighted blue. Click ► to move the selected columns to the right side of under <b>Sort Columns</b> . Continue moving columns to the right grid as needed.  |  |  |                                  |  |
| <b>(Right grid) Sort Columns</b>                 | <p>You can rearrange the columns to indicate the order in which you want the sort applied. Click a column name, and drag it up or down to a new location.</p> <p>In the right grid, for each column, click to indicate if you want that data sorted in ascending (e.g., A-Z, 0-9) or descending (e.g., Z-A, 9-0) order.</p> <p>To remove a column from the sort, select the column, and then click to move it back to the left grid.</p>  |  |  |                                  |  |



|               |  |   |
|---------------|--|---|
| <b>Filter</b> | <b>Filter report data:</b><br>When you want to view only certain data, you may find it useful to filter the report data. You can use specific criteria to retrieve only the data that you want. Not all reports allow this option.<br>From the report window, click <b>Sort/Filter</b> to open the <b>Sort/Filter</b> window. By default, the <b>Sort Criteria</b> section is expanded. Click <b>Filter Criteria</b> to expand the <b>Filter Criteria</b> section.<br>If the report does not allow sorting, the <b>Filter</b> button is displayed instead of the <b>Sort/Filter</b> button, and sort criterion fields are not available.<br>Click <b>Add Criterion</b> to add new filter criteria. A blank row is displayed in the grid. |   |
|               | <b>Field</b>   | <b>Description</b>  |
|               | <b>Column</b>  | Select a column by which to filter the data. The drop down lists the columns that appear on the report.   |
|               | <b>Operator</b>  | Select an operator.<br>= Equals<br>≠ Not equals<br>< Less than<br>≤ Less than or equal to<br>> Greater than<br>≥ Greater than or equal to   |
|               | <b>Value</b>   | Type the value by which you want to filter. For example, if you selected a date in the <b>Column</b> field, type a date to view only data for a specific date.  |
|               | <b>Other functions and features:</b>   |   |
|               | <b>Add Criterion</b>   | <a href="#">Add another row.</a><br>Select the logical connector ( <b>AND</b> or <b>OR</b> ) in the <b>Logical</b> field. Continue adding rows as needed.<br>Using the <b>AND</b> operator limits search results, because the program looks only for records that contain both criterion. Using the <b>OR</b> operator expands search results, because the program looks for records that contain either one criterion or the other, or both. |
|               | <b>Delete Selected</b>   | <a href="#">Delete selected row.</a><br>Select the row, and then click the <b>Delete Selected</b> button. The row is deleted from the filter criteria.  |
|               | <b>Click OK to apply the selected filter criteria to the report.</b><br><b>Click Cancel to close the dialog box without applying a filter.</b>   |   |
|               | <b>Reset</b>   | <a href="#">Reset report data.</a><br>Click to restore the report to the original view, removing all sorting and filtering that has been applied.   |
| <b>Reset</b>  | <b>Reset report data:</b><br>Click to restore the report to the original view, removing all sorting and filtering that has been applied.   |   |

# HRS8900 - Employee Data (ED)

## Personnel > Reports > TRS Reports > Employee Data (ED)

The Employee Data (ED) report is used to verify the employee data records to be submitted to TRS. You can use the report to review the employee data for accuracy and to verify that corrections were entered correctly. The report can be printed as often as required before actually creating the TRS employee data submission file.

This report is printed in landscape orientation.

| Parameter                                   | Parameter Description  |
|---|--|
| <b>From Report Date (MMYYYY)</b>            | Type the from report date in the MMYYYY format. This is a required field.  |
| <b>To Report Date (MMYYYY)</b>              | Type the to report date in the MMYYYY format. This is a required field.  |
| <b>Sort by Alpha (A), Employee Nbr (N)</b>  | A - Sort the report alphabetically.<br><br>N - Sort the report by employee number.<br><br>This is a required field.  |
| <b>Include Reports (Select From List)</b>   | Type a Y or an N to include or exclude specific reports (Demographics (ED20); Demographic Adjustment (ED25); Contract and Position (ED40); Contract and Position Adjustment (ED45); Termination (ED90)) separating each of the reports with a comma and no space (e.g., Y,N,N,N,Y). Or, click  to <a href="#">include reports</a> . This is a required field. |
| <b>Select Employee(s), or blank for ALL</b> | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers.   |



[Generate the report.](#)

# HRS8910 - Employment After Retirement (ER)

## Personnel > Reports > TRS Reports > Employment After Retirement (ER)

The Employment After Retirement (ER) report is used to verify the retired members' employment records to be submitted to TRS. You can use the report to review the retired members' employment data for accuracy and to verify that corrections were entered correctly. The report can be printed as often as required before actually creating the TRS retired member employment data submission file.

This report is printed in landscape orientation.

| Parameter                                   | Parameter Description   |
|---|---|
| <b>From Report Date (MMYYYY)</b>            | Type the from report date in the MMYYYY format. This is a required field.   |
| <b>To Report Date (MMYYYY)</b>              | Type the to report date in the MMYYYY format. This is a required field.   |
| <b>Sort by Alpha (A), Employee Nbr (N)</b>  | A - Sort the report alphabetically.<br><br>N - Sort the report by employee number.<br><br>This is a required field.   |
| <b>Include Reports (Select From List)</b>   | Type a Y or an N to include or exclude specific reports (Employment of Retirees (ER20); Add Adj (ER25); Edit Adj (ER27)) separating each of the reports with a comma and no space (e.g., Y,N,N). Or, click  to <a href="#">include reports</a> . This is a required field. |
| <b>Select Employee(s), or blank for ALL</b> | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers.  |

[Generate the report.](#)



# HRS4300 - Health Insurance Participation Report

## **Personnel > Reports > TRS Reports > Health Insurance Participation Report**

The report is a listing of all employees participating in the Health Insurance program. Employees can be sorted by alpha, pay campus, or primary campus.


The report can also be used to document the totals entered in the TRS Health Care Funding Report.

- Full-time employees are classified as TRS eligible and full-time. The total does not include new members within the 90-day waiting period.
- Part-time employees are classified as TRS eligible and part-time. The total does not include new members within the 90-day waiting period.
- Professional employees with zero supplemental amounts are classified as TRS eligible. The total does not include new members within the 90-day waiting period.
- Covered TRS members are classified as TRS eligible with Health Ins flag = Y or S. The total includes new members within the 90-day waiting period.
- Employees in the categories above may be active or inactive since they may have been paid off before the report is run.

Employees listed multiple times may be included in the totals defined above. It is the user's responsibility to adjust the data to ensure that each employee is counted once.

This report is printed in landscape orientation.

| Parameter  | Parameter Description  |
|--|--|
| <b>Sort by Alpha (A), Pay Campus (C), Primary Campus (P)</b> | <p>A - Sort the report alphabetically.</p> <p>C - Sort the report by pay campus.</p> <p>P - Sort the report by primary campus.</p> <p>This is a required field.</p>  |
| <b>Report Month (01-12)</b>                                  | Type a specific report month in the MM format (e.g., 11). The report month is used to determine if an employee is eligible for TRS or is still within the 90-day waiting period for TRS. This is a required field.   |
| <b>Report Year (YYYY)</b>                                    | Type a report year in the YYYY format. The report year is used to determine if an employee is eligible for TRS or is still within the 90-day waiting period for TRS. This is a required field.   |
| <b>Termination Date (MMDDYYYY)</b>                           | <p>Type a termination date in the MMDDYYYY format. This is a required field.</p> <p>If the termination date is equal to or greater than the termination date report parameter, the employee is included in the report.</p> <p>If an employee has been rehired and the rehire date is greater than the termination date report parameter, the employee is included in the report.</p> |



| Parameter  | Parameter Description  |
|--|--|
| <b>Include SSN on Report? (Y/N)</b>                        | <p>Y - Include employees' social security numbers on the report.</p> <p>N - Do not include employees' social security numbers on the report.</p> <p>This is a required field.</p>  |
| <b>Print Participant (P), Waiver (W), or blank for ALL</b> | <p>P - Include only employees participating in the Health Insurance program. Participants are employees with a Y or S selection in the Health Ins field under TRS Supplement on the Pay Info tab.</p> <p>W - Include only employees not participating in the Health Insurance program. Waivers are employees with a W selected on the <b>Health Ins</b> field under TRS Supplement on the Pay Info tab.</p> <p>Blank - Include all employees on the report.</p>  |
| <b>Select Frequency(ies), or blank for ALL</b>             | <p>Type a one-digit frequency number separating multiple frequency numbers with a comma (e.g., 5, 6). Or, click  to search for payroll frequencies. Otherwise, leave blank to use all payroll frequencies.</p> <p>If an employee is being paid in multiple pay periods and all other data regarding the employee that is reported is the same, the employee is reported once, and the payroll column reflects the multiple payrolls.</p> <p>If the data is not the same across the pay frequencies, the employee is reported multiple times.</p> <p><b>Example:</b> An employee is defined in pay frequency 5 for pay campus 100 and primary campus 700. He is also defined in pay frequency 6 for pay campus 100 and primary campus 200.</p> <p>If the report is sorted by primary campus, the employee is reported under campus 700 for payroll 5 and campus 200 for payroll 6.</p> <p>The employee is also counted twice in the employee totals.</p> |

[Generate the report.](#)

# HRS9800 - Member Data (MD)

## Personnel > Reports > TRS Reports > Member Data (MD)

The report is for your records and should be printed to verify the member data records being submitted to TRS. You can use the report to review the member data for accuracy and to verify that corrections were entered correctly. The report can be printed as often as required before actually creating the TRS member data file for submission.

| Parameter  | Parameter Description  |
|--|--|
| <b>From Report Date (MMYYYY)</b>                         | Type the from report date in the MMYYYY format. This is a required field.  |
| <b>To Report Date (MMYYYY)</b>                           | Type the to report date in the MMYYYY format. This is a required field.  |
| <b>Sort by Alpha (A), Employee Nbr (N), Staff ID (S)</b> | <p>A - Sort the report alphabetically.</p> <p>N - Sort the report by employee number.</p> <p>S - Sort the report by staff identification number.</p> <p>This is a required field.</p>  |
| <b>Include Reports (Select From List)</b>                | <p>Type a Y or an N to include or exclude specific reports separating each of the reports with a comma and no space (e.g., Y,N,N,N,Y,N).</p> <p>If no data is available, type N. Or, click  to include reports. This is a required field.</p> |
| <b>Select Employee(s), or blank for ALL</b>              | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers.   |



[Generate the report.](#)

# HRS8905 - Regular Payroll (RP)

## Personnel > Reports > TRS Reports > Regular Payroll (RP)

The Regular Payroll (RP) report is used to verify the regular payroll records to be submitted to TRS. You can use the report to review the regular payroll data for accuracy and to verify that corrections were entered correctly. The report can be printed as often as required before actually creating the TRS regular payroll submission file.

This report is printed in landscape orientation.

| Parameter                                   | Parameter Description  |
|---|--|
| <b>From Report Date (MMYYYY)</b>            | Type the from report date in the MMYYYY format. This is a required field.  |
| <b>To Report Date (MMYYYY)</b>              | Type the to report date in the MMYYYY format. This is a required field.  |
| <b>Sort by Alpha (A), Employee Nbr (N)</b>  | A - Sort the report alphabetically.<br><br>N - Sort the report by employee number.<br><br>This is a required field.  |
| <b>Include Reports (Select From List)</b>   | Type a Y or an N to include or exclude specific reports (Payroll (RP20); Payroll Adjustment (RP25)) separating each of the reports with a comma and no space (e.g., Y,N). Or, click  to <a href="#">include reports</a> . This is a required field. |
| <b>Select Employee(s), or blank for ALL</b> | Type the employee number separating multiple employee numbers with a comma. Or, click  to search for employees. Otherwise, leave blank to use all employee numbers.   |

[Generate the report.](#)

# User Created Reports

***Personnel > Reports > User Created Reports***

Use the Table of Contents to access a page.

# User Created Reports - HRS9000

## Personnel > Reports > User Created Reports

The User Created Reports page allows you to perform the following functions:

- Select the applicable fields (i.e., columns) from preselected columns under the following sections:
  - **Employee Demographic**
  - **Certification**
  - **Responsibility**
  - **Employment**
  - **Pay Information**
  - **Extra Duty Pay**
  - **Bank**
  - **Job Information**
  - **Distribution**
  - **Deductions**
- Create a report title.
- Save your report selections to create a customized report template that can be retrieved for future use. Additionally, you can set a report template to **Public** to allow others with access to User Created Reports to view and use the created report template.

Once the report is created, it can be sorted or filtered. To restore the report to the original view, click **Reset**.

### Run a report from a saved template:

|                        |   |
|------------------------|---|
| <b>Report Template</b> | Begin typing all or part of the name of an existing report template, or press the space bar to view all the templates. As you begin to type, a drop-down list displays report templates with titles that match the letters you have typed. From the drop-down list you can select the template. Only templates you created are listed in the drop-down list.<br>If you do not know the name of the report template, click <a href="#">Directory</a> to select a report template from the directory. From the directory, you can select templates you created as well as public templates. |
|------------------------|---|


### Create a new template:

|                        |   |
|------------------------|---|
| <b>Report Template</b> | Type the name of a new report template. Only alphanumeric characters are allowed. If you type a name that is already used, it will overwrite the previous template. |
| <b>Public</b>          | Select to make the report accessible to other users. All users in the district who have access to this page will be able to use the template.                       |


- After entering the title and selecting the columns to include, click **Save**.


### Create a new report:

|                     |   |
|---------------------|---|
| <b>Report Title</b> | Type a title for the report, up to 35 characters. |
|---------------------|---|


- The fields are grouped by business table. Select the fields for which you want to print information. You can select an entire group of fields by selecting the group name (e.g., **Employee Demographic**).
- In the **Employee Nbr** field, click  to open the [Employees directory](#). Select the employees to be included in the report or leave blank to include all employees.
- Select **Employed Only** to include only employees who are currently employed based on the current date, employment date, reemployment date, and term date.
- Click **Create Report** to generate the report. [Review, save, and/or print the report.](#)

### Review the report using the following buttons:


Click  to go to the first page of the report.


Click  to go back one page.

Click  to go forward one page.

Click  to go to the last page of the report.

### The report can be viewed and saved in various file formats.

Click  to save and print the report in PDF format.

Click  to save and print the report in CSV format. (This option is not available for all reports.) When a report is exported to the CSV format, the report headers may not be included.

Click **X** to close the report window. Some reports may have a **Close Report**, **Exit**, or **Cancel** button instead.

## Other functions and features:

|             |  |
|-------------|--|
| <b>Sort</b> | <p><a href="#">Sort report data.</a></p> <p>You can rearrange the fields to indicate the order in which you want the sort applied. Click a field name, and drag it up or down to a new location.</p> <ul style="list-style-type: none"> <li>• In the right grid, for each field, click to indicate if you want that data sorted in ascending (e.g., A-Z, 0-9) or descending (e.g., Z-A, 9-0) order.</li> <li>• To remove a field from the sort, select the field, and</li> </ul> |
|-------------|--|

| <b>Filter</b>          | <p><a href="#">Filter report data.</a></p> <p>When you want to view only certain data, you may find it useful to filter the report data. You can use specific criteria to retrieve only the data that you want. Not all reports allow this option.</p> <p>From the report window, click <b>Sort/Filter</b> to open the Sort/Filter window. By default, the <b>Sort Criteria</b> section is expanded. Click <b>Filter Criteria</b> to expand the <b>Filter Criteria</b> section. If the report does not allow sorting, the <b>Filter</b> button is displayed instead of the <b>Sort/Filter</b> button, and sort criterion fields are not available.</p> <p>Click <b>Add Criterion</b> to add new filter criteria. A blank row is added to the grid.</p> <table border="1" data-bbox="225 448 1477 1108"> <thead> <tr> <th>Field</th><th>Description</th></tr> </thead> <tbody> <tr> <td><b>Column</b></td><td>Select a field by which to filter the data. The drop down lists the columns that appear on the report.</td></tr> <tr> <td><b>Operator</b></td><td>           Select an operator.<br/><br/>           = Equals<br/>           ≠ Not equals<br/>           &gt; Greater than<br/>           ≥ Greater than or equal to<br/>           &lt; Less than<br/>           ≤ Less than or equal to         </td></tr> <tr> <td><b>Value</b></td><td>           Type the value by which you want to filter. For example, if you selected a date in the <b>Column</b> field, type a date to view only data for a specific date.<br/> <b>Note:</b> When filtering report data by date, you must use the following formats: If the date is displayed in the MM/DD/YYYY format, the filter value must be in the YYYYMMDD format. If the date is displayed in the MM/YYYY format, the filter value must be in the YYYYMM format. If the date is displayed in the MM/YY format, the filter value must be in the YYMM format.         </td></tr> </tbody> </table> <p><b>Other functions and features:</b></p> <table border="1" data-bbox="225 1142 1477 1512"> <tbody> <tr> <td><b>Add Criterion</b></td><td> <a href="#">Add another row.</a><br/>           Select the logical connector (AND or OR) in the Logical field. Continue adding rows as needed.<br/>           Using the AND operator limits search results, because the program looks only for records that contain both criterion. Using the OR operator expands search results, because the program looks for records that contain either one criterion or the other, or both.         </td></tr> <tr> <td><b>Delete Selected</b></td><td> <a href="#">Delete selected row.</a><br/>           Select the row, and then click the button. The row is deleted from the filter criteria.         </td></tr> </tbody> </table> <p>Click <b>OK</b> to apply the selected filter criteria to the report.</p> <p>Click <b>Cancel</b> to close the dialog box without applying a filter.</p> | Field | Description | <b>Column</b> | Select a field by which to filter the data. The drop down lists the columns that appear on the report. | <b>Operator</b> | Select an operator.<br><br>= Equals<br>≠ Not equals<br>> Greater than<br>≥ Greater than or equal to<br>< Less than<br>≤ Less than or equal to | <b>Value</b> | Type the value by which you want to filter. For example, if you selected a date in the <b>Column</b> field, type a date to view only data for a specific date.<br><b>Note:</b> When filtering report data by date, you must use the following formats: If the date is displayed in the MM/DD/YYYY format, the filter value must be in the YYYYMMDD format. If the date is displayed in the MM/YYYY format, the filter value must be in the YYYYMM format. If the date is displayed in the MM/YY format, the filter value must be in the YYMM format. | <b>Add Criterion</b> | <a href="#">Add another row.</a><br>Select the logical connector (AND or OR) in the Logical field. Continue adding rows as needed.<br>Using the AND operator limits search results, because the program looks only for records that contain both criterion. Using the OR operator expands search results, because the program looks for records that contain either one criterion or the other, or both. | <b>Delete Selected</b> | <a href="#">Delete selected row.</a><br>Select the row, and then click the button. The row is deleted from the filter criteria. |
|------------------------|---|-------|-------------|---------------|--|-----------------|---|--------------|--|----------------------|--|------------------------|---|
| Field                  | Description   |       |             |               |  |                 |   |              |  |                      |  |                        |   |
| <b>Column</b>          | Select a field by which to filter the data. The drop down lists the columns that appear on the report.  |       |             |               |  |                 |   |              |  |                      |  |                        |   |
| <b>Operator</b>        | Select an operator.<br><br>= Equals<br>≠ Not equals<br>> Greater than<br>≥ Greater than or equal to<br>< Less than<br>≤ Less than or equal to   |       |             |               |  |                 |   |              |  |                      |  |                        |   |
| <b>Value</b>           | Type the value by which you want to filter. For example, if you selected a date in the <b>Column</b> field, type a date to view only data for a specific date.<br><b>Note:</b> When filtering report data by date, you must use the following formats: If the date is displayed in the MM/DD/YYYY format, the filter value must be in the YYYYMMDD format. If the date is displayed in the MM/YYYY format, the filter value must be in the YYYYMM format. If the date is displayed in the MM/YY format, the filter value must be in the YYMM format.  |       |             |               |  |                 |   |              |  |                      |  |                        |   |
| <b>Add Criterion</b>   | <a href="#">Add another row.</a><br>Select the logical connector (AND or OR) in the Logical field. Continue adding rows as needed.<br>Using the AND operator limits search results, because the program looks only for records that contain both criterion. Using the OR operator expands search results, because the program looks for records that contain either one criterion or the other, or both.  |       |             |               |  |                 |   |              |  |                      |  |                        |   |
| <b>Delete Selected</b> | <a href="#">Delete selected row.</a><br>Select the row, and then click the button. The row is deleted from the filter criteria.   |       |             |               |  |                 |   |              |  |                      |  |                        |   |
| <b>Reset</b>           | <p><a href="#">Reset report data.</a></p> <p>Click to restore the report to the original view, removing all sorting and filtering that has been applied.</p>  |       |             |               |  |                 |   |              |  |                      |  |                        |   |
| <b>Delete</b>          | <p><a href="#">Delete a report template.</a></p> <p>Select the template in the <b>Report Template</b> field and click <b>Delete</b>.</p>  |       |             |               |  |                 |   |              |  |                      |  |                        |   |





## Back Cover