Personnel: Tables

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Tables

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ACA 1095 Codes

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1095-B Coverage Type - HRS2955

Personnel > Tables > ACA 1095 Codes > 1095-B Coverage Type

This tab allows you to maintain user- and IRS-defined ACA 1095-B coverage type codes as needed.

Add a new code:

❏ Click **+Add** to add a row.

Field	Description
Code	Type the one-digit 1095-B coverage type code.
Description	Type the 1095-B coverage type code. The field can be a maximum of 80 characters.

❏ Click **Save**.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Print	Click to print the report. Review the report.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.

1095-C Offer of Coverage - HRS2955

Personnel > Tables > ACA 1095 Codes > 1095-C Offer of Coverage

> This tab allows you to maintain user- and IRS-defined ACA 1095-C offer of coverage codes as needed.

Add a new code:

❏ Click **+Add** to add a new row.

Field	Description
Code	Type the one-digit 1095-C offer of coverage code.
Description	Type the 1095-C offer of coverage code description. The field can be a maximum of 80 characters.

❏ Click **Save**.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Print	Click to print the report. Review the report.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.

1095-C Safe Harbor - HRS2955

Personnel > Tables > ACA 1095 Codes > 1095-C Safe Harbor

This tab allows you to maintain user- and IRS-defined ACA 1095-C safe harbor codes, as needed.

Add a new code:

❑ Click **+Add** to add a row.

Field	Description
Code	Type the one-digit 1095-C safe harbor code.
Description	Type the 1095-C safe harbor description. The field can be a maximum of 80 characters.

❑ Click **Save**.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Print	Click to print the report. Review the report.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.

Credential

Use the Table of Contents to access a page.

Certification Type - HRS2200

Personnel > Tables > Credential > Certification Type

This tab is used to maintain one-character codes for certificates held by the employees as well as a description of the codes. The information on this table can then be used to populate the employee certification data on the Credentials tab on the Staff Demo page. Maintaining this information will assist in identifying those staff members that may have teaching credentials that are temporary and must be renewed.

Add a certificate code:

❑ Click **+Add** to add a row.

Field	Description
Certificate Type Code	Type a one-character code representing a certificate held by the employee.
Certificate Type Description	Type the description of the certificate. The description can be a maximum of 20 characters.

❑ Click **Save** to save the changes.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Print	Print the code table data. Click to print code table data. The following Credential Code Table options are displayed: **Current Tab Page** - prints only the tab page currently open. **Selected Code Tables** - displays the following Credential Code Table Selection options: Major/Minor Table College Table Certification Type Table Specialty Area Table Teaching Specialty Table Service Record Notes Table **All Account Code Tables** - prints all the Account Codes tab pages. Select an option, and then click **OK** to view a copy of the report. Otherwise, click **Cancel** to return to the tab. Review the report.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.

College Code - HRS2200

Personnel > Tables > Credential > College Code

This tab is used to maintain codes for colleges and universities as well as the name of the institution and the state in which the institution is located.

Add a college code:

❑ Click **+Add** to add a row.

Note: If an employee has a degree from a foreign university, enter the name of the college only in the **College Name** field.

Field	Description
College Code	Type the code that represents the college or university for the record being added. The code is limited to six characters.
College State	Click ⌄ to select the state, or type the two-character state abbreviation.
College Name	Type the name of the college represented by the college code. The description can be a maximum of 30 characters.

❑ Click **Save** to save the changes.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Print	Print the code table data. Click to print code table data. The following Credential Code Table options are displayed: **Current Tab Page** - prints only the tab page currently open. **Selected Code Tables** - displays the following Credential Code Table Selection options: Major/Minor Table College Table Certification Type Table Specialty Area Table Teaching Specialty Table Service Record Notes Table **All Account Code Tables** - prints all the Account Codes tab pages. Select an option, and then click **OK** to view a copy of the report. Otherwise, click **Cancel** to return to the tab. Review the report.

🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.

Major/Minor - HRS2200

Personnel > Tables > Credential > Major/Minor

This tab is used to maintain two-character codes for college degrees as well as a description of the codes. The information on this table can then be used to populate the Credentials tab on the Staff Demo page with applicable education data for an employee. Maintaining this information will assist in identifying those staff members that may have a college degree or hours to teach or serve in an area that is critical to the district. This data can then be extracted using the HRS1400 - Employee Education Report.

Add a major/minor code:

❑ Click **+Add** to add a row.

Field	Description
Major/Minor Code	Type a two-character code representing a college degree.
Major/Minor Description	Type an explanation of the two-character college code. The description can be a maximum of 30 characters.

❑ Click **Save**.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Print	Click to print code table data. The following Credential Code Table options are displayed: **Current Tab Page** - prints only the tab page currently open. **Selected Code Tables** - displays the following Credential Code Table Selection options: Major/Minor Table College Table Certification Type Table Specialty Area Table Teaching Specialty Table Service Record Notes Table **All Account Code Tables** - prints all the Account Codes tab pages. Select an option, and then click **OK** to view a copy of the report. Otherwise, click **Cancel** to return to the tab. Review the report.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.

Service Record Notes - HRS2200

Personnel > Tables > Credential > Service Record Notes

This tab is used to maintain the service record notes for employees within the district. The information on this table can then be used to populate the **Notes** field on the Service Record tab on the Staff Demo page.

Add a service record note:

❏ Click **+Add** to add a row.

Add the appropriate service record notes.

❏ Click **Save** to save the changes.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Print	Print the code table data. Click to print code table data. The following Credential Code Table options are displayed: **Current Tab Page** - prints only the tab page currently open. **Selected Code Tables** - displays the following Credential Code Table Selection options: Major/Minor Table College Table Certification Type Table Specialty Area Table Teaching Specialty Table Service Record Notes Table **All Account Code Tables** - prints all the Account Codes tab pages. Select an option, and then click **OK** to view a copy of the report. Otherwise, click **Cancel** to return to the tab. Review the report.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.

Specialty Area - HRS2200

Personnel > Tables > Credential > Specialty Area

This tab allows you to maintain the two-character specialty required within the district for a specific position. The page also allows you to record a description of the specialty area code.

Add a specialty area code:

❑ Click **+Add** to add a row.

Field	Description
Area of Specialization Code	Type a code representing the area of specialization. The field can be a maximum of two characters.
Area of Specialization Description	Type the description of the specialty. The field can be a maximum of 20 characters.

❑ Click **Save** to save the changes.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Print	Print the code table data. Click to print code table data. The following Credential Code Table options are displayed: **Current Tab Page** - prints only the tab page currently open. **Selected Code Tables** - displays the following Credential Code Table Selection options: Major/Minor Table College Table Certification Type Table Specialty Area Table Teaching Specialty Table Service Record Notes Table **All Account Code Tables** - prints all the Account Codes tab pages. Select an option, and then click **OK** to view a copy of the report. Otherwise, click **Cancel** to return to the tab. Review the report.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.

Teaching Specialization - HRS2200

Personnel > Tables > Credential > Teaching Specialization

This tab is used to maintain the two-character area of teaching expertise by employees within the district. The tab also allows you to record a description of the teaching area of expertise.

Add a teacher specialization code:

❑ Click **+Add** to add a row.

Field	Description
Teaching Spec Code	Type a three-character code representing the teaching area of specialization.
Teaching Description	Type a description of the specialization. The description can be a maximum of 20 characters.
PEIMS PK Teacher Requirement	PEIMS Reporting Element Indicates if a particular teaching specialization code is associated with required additional qualifications for the High Quality Prekindergarten grant. Click ⌄ to select one of the additional qualifications in which a prekindergarten teacher must be certified per the Texas Education Data Standards (TEDS). The following codes are found in the PEIMS C207 code table: 01 Certification offered accredited by Montesorri 02 At least 8 yr experience teaching in natl accredited child care pgm (**Code not valid for the 2024 school year**) 03 Employed as a pre-k tchr in sch dist where pre-k pro devt met 04 A grad or undergraduate degree in early childhood ed or early childhood spec ed (**Code not valid for the 2024 school year**) 05 A Child Development Associate (CDA) credential 06 Documented completion of the TSR Comprehensive

❑ Click **Save** to save the changes.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.

Print	Print the code table data.
	Click to print code table data. The following Credential Code Table options are displayed:
	Current Tab Page - prints only the tab page currently open.
	Selected Code Tables - displays the following Credential Code Table Selection options:
	Major/Minor Table
	College Table
	Certification Type Table
	Specialty Area Table
	Teaching Specialty Table
	Service Record Notes Table
	All Account Code Tables - prints all the Account Codes tab pages.
	Select an option, and then click **OK** to view a copy of the report. Otherwise, click **Cancel** to return to the tab.
	Review the report.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved.
	Click **Save**.

District HR Options - HRS2000

Personnel > Tables > District HR Options

> This page is used to select and set options for management of the LEA's payroll and employee functions and records. The selected options are used for all payroll frequencies (e.g., current and next year unless specifically designated).

Set district HR options:

Field	Description
TRS District ID	Type the four-digit LEA identification number.
Federal ID Number (EIN)	The federal ID number from the Finance > Tables > District Finance Options > Finance Options page in Finance is displayed.
Payroll Clearing Fund/Year	This field is automatically populated with the payroll clearing fund/year selected on the Finance > Tables > District Finance Options > Clearing Fund Maintenance tab. If not, click ⌄ to select the fund/fiscal year (e.g., 163/9) for the current year to be used as the clearing fund/fiscal year when interfacing to Finance.
TWC District ID	Type the nine-digit identification number assigned by the Texas Workforce Commission.
Use Direct Deposit (Y, N, or E)	Click ⌄ to select whether to use direct deposit, not use direct deposit, or use electronic funds transfer.
TRS Cost Education Index	Type the value assigned to the district by TEA. This value is used for adjusting the state minimum salary for costs beyond the district control. This value can be found on the Summary of Finances (SOF) report issued by TEA. For more information, visit TEA's Foundation School Program web page. **Note**: Per the State of Texas Education Code, Section 42.102, effective September 01, 2019, the TRS Processing Extract will no longer use the cost of education adjustment (index) (CEI) value when calculating TRS 373 Statutory Minimum Contributions. As a result: • The Adjusted State Minimum salary is not calculated and state contributions are due on all eligible compensation paid above the statutory minimum salary schedule. • The CEI value no longer exists in TRS 373 Above State Base calculations that are used in TRS Processing, NY Payroll to Budget, and PMIS Simulations. • The **TRS Cost Education Index** field remains on the Payroll > Tables > District HR Options page for any 2018 processing needs. Future software updates will remove the CEI, reformat the TRS 373 report to remove the Adjusted State Minimum column, rename TRS Non-OASDI (Reporting Entity Payment for Non-OASDI Members) to Public Education Employer Contribution and any other changes that are required to coincide with TRS changes.

Field	Description
Distributions Built By Amt or %	Click ⌄ to select whether you want to create/edit employee salary distributions by amount and allow the percentages to be automatically calculated, or only enter the percentages and allow amounts to be automatically calculated.
Apply Leave Used or Earned First	Click ⌄ to select the sequence used to post employee leave transmittals and leave applied using the payroll control record. Posting leave used first to apply leave earned after applying leave used can result in docking an employee's pay during the current payroll period even if the employee has earned leave during the current payroll period. (The user needs to check the local leave policy.) Posting leave earned first causes the leave earned for the pay period to be added to the leave balance before the leave used for the pay period is deducted from the balance. It allows employees to use all available leave posted through the payroll calculations control record with docking occurring when the amount of leave used exceeds the total amount possible.
Leave Code for State Sick	Click ⌄ to select the two-digit code used to charge an employee's absence to state sick leave. State sick leave is leave earned and accumulated prior to 1997. Leave transmittals for this leave type may affect service record days employed.
Leave Code for State Personal	Click ⌄ to select the two-digit code used to charge an employee's absence to state personal leave. State personal leave is leave earned and accumulated by the employee since 1997. Leave transmittals for this leave type may affect service record days employed.
Update Actual Hours From Payroll Processing	Select to use actual hour data from the pay transmittals during the Payroll > Payroll Processing > Run Payroll process to update/insert records in the Actual Hours table that is used for TRS processing. This field is selected by default. **Example**: If actual hours are added to the employee's pay transmittal, then during the payroll processing, the Pre-Post Actual Hours Worked Report displays the actual hours worked from the pay transmittal. After running payroll, use the Payroll > Maintenance > Actual Hours Worked page to verify that the actual hours worked data was updated for each applicable employee. If not selected, you must either use the Payroll > Utilities > Import Actual Hours Worked page to import the actual hours from a file or manually enter the data on the Payroll > Maintenance > Actual Hours Worked page.
Calculate Accrual Salaries	Select to have the system calculate accrued salaries. If the field is not selected, salaries are not accrued.
Check Amount - Alpha	Select to spell the check amount on all payroll checks. If the field is not selected, the system uses a numerical value for the check amount on all payroll checks.
Summarize Benefits Interface	Select to display benefits in a summary format. If not selected, the benefits are displayed in a detail format. If selected, the benefit accounts are collapsed to a zero subobject and the last three digits of the code (e.g., 199-11-6119-01-001-311423 benefit accounts are collapsed to 199-11-6119-00-001-311000).

Field	Description
Supplemental Tax Rate	Type the percent to apply for supplemental income.
Standard Hours per Workday	Type the standard number of hours the LEA requires that hourly employees work.
Max Gross Amt for District	Type the amount of the largest gross employee paycheck for the district. A failure message is issued when a paycheck over this amount is attempted to be processed. If the check amount is correct, reset this field by entering a larger value and recalculate to continue processing payroll. If the check amount is incorrect, correct the check amount and recalculate to continue processing payroll.
Auto Assign Employee Number	Select to have the system assign new employee numbers automatically. If the field is not selected, the user must enter the new employee numbers manually.
Next Available Employee Number	The number displayed is the last number used plus 1. Click **Next Available Employee Number**. The system displays the next available employee number. If the **Auto Assign Employee Number** field is not selected, the **Employee Number** field is active. Select the field to highlight it and type a new next number for manual employee number assignment. **Note**: If the employee number has reached the maximum number (e.g., 999999), the system goes back to 000001 and begins to search for the next available number that was not previously used (e.g., 000995). If all available numbers were previously used, the system displays the message: "All available employee numbers are used." Users must take the actions necessary to clear old or inactive employee numbers from this file ID.
School Year for PEIMS Codes	Type the school year for the PEIMS edit tables in the YYYY format. **Note**: If the **School Year for PEIMS Codes** field does not contain a valid value or if left blank, values are not displayed in the **PEIMS** drop-down fields (e.g., **Sex**, **Ethnicity**, etc.) on the Personnel > Maintenance > Staff Demo > Demographic Information page.
Use Emp Nbr or SSN in EFT File	Click ⌄ to select whether the employee number or the social security number should be included in the EFT file. By default, the field is set to *E - Employee Nbr*.
Set Demo Alpha Fields to Uppercase	Select to set the employee's **Legal** and **Former Name** (**First**, **Middle**, **Last**, and **Maiden**) and **Address** fields to uppercase when a new employee demographic record is created or an existing record is updated on the Personnel > Maintenance > Staff Demo > Demographic Information tab.

❑ Under **Automatically Compute**, select whether to automatically compute the **Pay Rate**, **Daily Rate**, **Dock Rate**, **Accrual Rate**, or **Overtime Rate**. This function relates to the pay fields at the bottom of the Job Info page and affects the current year and next year calculations. These fields are not referenced by the system when performing automatic salary calculations through Mass Update in Utilities.

Note: If **Use PMIS** is selected on the District Administration > Options > PMIS District Options page, all of the check boxes under **Automatically Compute** are cleared and disabled.

❑ Under **W-2 Print Options**, select the amounts to be included on the employee W-2 (Box 14). These options also apply to W-2 forms that are printed from ASCENDER EmployeePortal.

Amount Type	Description/Calculation (from the Calendar YTD page)
TRS	TRS Salary Reduction
HLTH	Health Insurance
CAF	Cafeteria 125
NTA	N-TRS N-Tax Bus Allow + N-TRS N-Tax N-Pay Allow
TXA	Non-TRS Reimbr Base + Non-TRS Bus Allow + Non-TRS Reimbr Excess + N-TRS N-Pay Bus Allow - Taxed Fringe Benefits
TFB	Tax Fringe Benefit (Taxed Fringe Benefits + Tax Emplr Ins Contr)

❑ Under **Default Overtime Object Code**, click ⌄ to select the object codes for **Professional**, **Para-Professional/Hourly**, or **Other** overtime fund account options. These objects override object codes in the employee distribution record when overtime hours transmittals are submitted.

❑ Under **TEA Health Ins Contribution**:

Amount	Type the amount of the TEA state health insurance contribution (e.g., 75.00). **Note**: For an employee to be eligible for the TEA health insurance contribution, the employee must have a Y in the **Health Insurance Code** field on the Pay Info tab in Maintenance, must be eligible for TRS (TRS Status Code must be set to 1 in the **TRS Eligible** field on the Pay Info tab), and have a Deduction Code with the abbreviated code of AC. Also, the AC deduction must have a remaining payment greater than zero. The AC abbreviation is located on the Payroll > Tables > Tax/Deductions > Deduction Code tab.
Obj	Click ⌄ to select the object code of the account number for the amount to be expensed in the Finance system.
Sobj	Click ⌄ to select the subobject code of the account number for the amount to be expensed in the Finance system. **Note**: If the district does not use one of the pay frequencies, access to these fields is not allowed. If the user does not have security access to a pay frequency, access to these fields is not allowed.

❑ Under **First Pay Date of School Year**:

Payroll 4, Payroll 5, and Payroll 6	Type the first pay date for each of the three pay frequency fields in the MM-DD-YYYY format. Once the pay date is entered, it should not be changed until the next school year. The date entered here should be representative of a payroll that will actually be processed, whether supplemental or regular. If a date is entered and no payroll is actually posted using that date, the system will have difficulty identifying when the new school year began. This could affect how data is handled in the new school year.

Additional first pay date notes

Fiscal Year versus School Year

- If your fiscal year is July through June and the 10-month employees are paid from September through August, this date should be September.
- If your fiscal year is July through June and all employees (including 10-month employees) are paid from August through July, those employees should all have **TRS Year** selected on the

Payroll > Maintenance > Staff Job/Pay Data > Job Info tab.

- If the **First Pay Date of School Year** field has an August date, a new school YTD is created and updated with all pay and accrual amounts. The TRS YTD is updated in the old school year. For example, if the first pay date of the school year is August 25, 2023, pay and accruals are updated in the 2024 school YTD and the 2023 TRS YTD is updated.
  Note: If the **First Pay Date of School Year** field is set to a date prior to September, be sure to verify that your TRS rates correspond to the appropriate TRS reporting month.
- If the **First Pay Date of School Year** field is updated with a September date, the school YTD and TRS YTD are updated in the current school year and if accruing, a new school YTD is created and updated with those amounts. For example, if the first pay date of the school year is September 25, 2023, pay and TRS amounts are updated in the 2024 school YTD and the 2024 TRS YTD. If the employee accrues, a 2024 school YTD is also created.
- If your fiscal year is September through August and the 10-month employees are paid from September through August, this date should be September.
- If end-of-year payroll accruals are performed for August days worked and the first paycheck is in September, the first pay date should be September.
- All non-standard employees (those employees who receive their first check in July or August) should have **TRS Year** selected on the Payroll > Maintenance > Staff Job/Pay Data > Job Info tab.

This pay date is used to determine:

- The school year to be used for the school YTD records for regular and non-standard employees. If the employee is a non-standard employee (**TRS Year** is selected), and the contract begin date is greater than this date, then the payroll calculation stores the accrual amounts in the next year school YTD record.
- The school year that should be used for the TRS rates and employee TRS deposit record.
- The pay history records that should be used for accruals.
- The leave transmittals that should be accumulated to determine if the leave duration has been met for the school year.

Notes:

If the LEA does not use one of the pay frequencies, access to that field is not allowed. If a user does not have security access to a pay frequency, access to that field is not allowed.

When the first pay date of the school year is changed, if any message displayed includes information about contacting your regional consultant, there are processed pay dates where amounts need to be moved from one school year to another. If these amounts are not moved, it can adversely affect school YTD historical amounts, TRS historical amounts, and reporting, workers' compensation historical amounts and reporting, and payroll accrual calculations.

❑ Under **TRS Extract Options**:

Note: The ER20 always extracts the actual hours for retired employees.

Use Pay Dates for TRS Month or Actual Date	This field applies to the RP20 and ER20 extracts.
	Select *A - Actual Hours Table Date* to use the actual date from the Maintenance > Actual Hours Worked page to determine the accumulated actual hours worked for pay type 3 employees. And, determine the days worked for pay type 4 jobs (i.e., substitutes). The actual date, month and year, must be the same as the TRS reporting month and year.
	The RP20 and ER20 extracts include all actual hours worked table entries regardless if the associated pay date is processed or unprocessed. The TRS month associated with the pay date is ignored.
	Select *P - Pay Dates for TRS Month* to use the pay date from the pay dates table to determine the accumulated actual hours for a pay type 3 job. And, determine the days worked for pay type 4 jobs (i.e., substitutes). The associated pay date must be a processed pay date that has the same month and year as the TRS reporting month and year. The actual date is ignored.
Pay Type 1 - Report Actual or Scheduled Hours	This field applies to the RP20 extract.
	Select *A - Actual Hours* to report actual hours worked for a pay type 1 job. Review the **Use Pay Dates for TRS Month or Actual Date** field selection to determine how the records are selected from the actual hours worked table.
	Select *S - Scheduled Hours* to report scheduled hours worked for a pay type 1 job. If *S - Scheduled Hours* is selected, then the hours are reported based on the assigned calendar. The TRS workday calendar is used for employees who do not have an assigned calendar.
Pay Type 2 - Report Actual or Scheduled Hours	This field applies to the RP20 extract.
	Select *A - Actual Hours* to report actual hours worked for a pay type 2 job. Review the **Use Pay Dates for TRS Month or Actual Date** field selection to determine how the records are selected from the actual hours worked table.
	Select *S - Scheduled Hours* to report scheduled hours worked for a pay type 2 job. If *S - Scheduled Hours* is selected, then the hours are reported based on the assigned calendar. The TRS workday calendar is used for employees who do not have an assigned calendar.
Pay Type 3 - Report Actual or Scheduled Hours	This field applies to the RP20 extract.
	Select *A - Actual Hours* to report actual hours worked for a pay type 3 job. Review the **Use Pay Dates for TRS Month or Actual Date** field selection to determine how the records are selected from the actual hours worked table.
	Select *S - Scheduled Hours* to report scheduled hours worked for a pay type 3 job. If *S - Scheduled Hours* is selected, then the hours are reported based on the assigned calendar. The TRS workday calendar is used for employees who do not have an assigned calendar.

❑ Click **Save**.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Print	Click to print the report. Review the report.

District HR Options - HRS2000

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~~HIDEPAGE~~

EP Self-Service Assignments Demographic - HRS2050

Personnel > Tables > EP Self-Service Assignments Demographic

This page allows you to control the demographic fields available for updating or viewing on the EmployeePortal Self-Service Profile page. The user can access the EmployeePortal Self-Service Profile page by clicking their name in the upper-left corner or by clicking 👤 in the EmployeePortal application.

The fields on the page are grouped in categories such as **Legal Name** so that one approver will approve or disapprove all elements of the employee's name.

If an approver is terminated, the LEA needs to update the approver ID to another approver ID. Changes pending the prior approver's approval need to be moved to the new approver, and an email message will be sent to the new approver.

Set demographic fields:

Field	Description
Option	Click ⌄ to select the code to determine if data can be updated, viewed, or not displayed at all on the EmployeePortal Self-Service Profile page. *U - Update* - The user can submit changes to all information listed in the category. *I - Inquiry* - The user can only view the information listed in the category and cannot submit changes. *N - None* - The user cannot view or make changes to any information listed in the category.
Approver ID	Click ⌄ to select the user ID of the person authorized to approve data changes in the category displayed. **Notes**: The **Approver ID** field or the **Auto** check box must be completed; one is required. If **Auto** is selected, the **Approver ID** field remains blank and is disabled.
Auto	Select to allow users to automatically update the information listed in the category without requiring approval. **Notes**: The **Approver ID** field or the **Auto** check box must be completed; one is required. If **Auto** is selected, the **Approver ID** field remains blank and is disabled. If the **Option** field is set to **Inquiry**, **Auto** remains blank.
Doc Required	Select if documentation is required before a change can be implemented for a specific field. An email message will be sent to the employee regarding the documentation needed.
Required Field	Select if the field displayed is required. If a field is required, it may not be left blank on the EmployeePortal Self-Service Profile page.

❑ Click **Save**.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.

Self-Service Assignments - Demographic - HRS2050

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~~HIDEPAGE~~

Insurance Company Codes - HRS2900

Personnel > Tables > Insurance Company Codes

This page allows you to add and maintain basic information about insurance companies for reporting.

Add or retrieve insurance company data:

Add	Click to add insurance company data. A blank insurance company code record is displayed.	OR	**Retrieve an existing record.**	Click ⋮ to search for and select an insurance company code. Or, begin typing the insurance company code or name. As you type the data, a drop-down list of corresponding data is displayed. Select an insurance company code or name and click **Retrieve**.

❏ Under **Insurance Company Codes**:

Field	Description
Company Code	Type the code associated with the insurance company. The field can be a maximum of five digits.
Company Name	Type the name of the insurance company. The field can be a maximum of 30 characters.
Street Nbr	Type the street number of the insurance company. The field can be a maximum of six digits.
Street Name	Type the street name of the insurance company. The field can be a maximum of 20 characters.
City	Type the name of the city in which the insurance company is located. The field can be a maximum of 25 characters.
State	Click ⌄ to select the two-character abbreviation of the state in which the insurance company is located.
Zip Code	Type the five-digit zip code that indicates the location of the insurance company.
+4	Type the four-digit additional zip code indicating the location of the insurance company.
Phone Number	Type the three-digit area code and seven-digit phone number of the insurance company.
Extension	Type the phone number extension, if applicable.
Contact	Type the contact name associated with the insurance company. The field can be a maximum of 30 characters.

❏ Under **Insurance Plans**, click **+Add** to add a plan number, description, and group number. The system populates the **Code** and **Company Name** fields with data from the selected company.

Plan Number	Type the insurance plan number. The field can be a maximum of 20 digits.
Plan Description	Type the description of the type of insurance plan. The field can be a maximum of 20 characters.
Group Nbr	Type the group number for the district. The field can be a maximum of 20 digits.

Self-Insured	Select to identify the health insurance plan as being a plan in which the employer assumes the financial responsibility for providing health care benefits to its employees. This field should be selected for PPO plans (e.g., TRS ActiveCare 1-HD, 2, and Select plans).

❏ Click **Save**.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Print	Click to print the report. Review the report.
Delete	Click to delete the insurance company record. A message is displayed asking if you want to delete the record. Click **Yes** to delete the record. Click **No** to not delete the record and return to the Insurance Company Codes tab.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.

Insurance Company Codes - HRS2900

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~~HIDEPAGE~~

Job/Contract

Use the Table of Contents to access a page.

Contract Class - HRS2500

Personnel > Tables > Job/Contract > Contract Class

This tab is used to create and maintain the codes used to manage employee contract information on the Staff Job/Pay Data > Employment Info tab.

Note: The CYR or NYR Contract Class page is displayed depending on the payroll logon.

Set up contract class codes:

❏ Click **+Add** to add a row.

Field	Description
Contract Class Code	Type a code to identify the contract class. The field can be a maximum of two characters.
Contract Class Description	Type a description for the contract class. The field can be a maximum of 20 characters.

❏ Click **Save**.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Print	Click to print job contract table data. The following Job Contract Table options are displayed: **Current Tab Page** - prints only the tab page currently open. **Selected Code Tables** - displays the following Job Contract Table options: • Job Code Table • Contract Class Table • Contract Term Table • Contract Year Table • Extract ID Table • Termination Reason Table **All Code Tables** - prints all the Job/Contract tab pages. Select an option, and then click **OK** to view a copy of the report. Otherwise, click **Cancel** to return to the tab. Review the report.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.

Contract Term - HRS2500

Personnel > Tables > Job/Contract > Contract Term

This tab is used to create and maintain the codes used to manage employee contract information on the Staff Job/Pay Data > Employment Info tab.

Note: The CYR or NYR Contract Term page is displayed depending on the payroll logon.

Set up contract term codes:

❏ Click **+Add** to add a row.

Field	Description
Contract Term Code	Type a code used to identify the contract term. The field can be a maximum of two characters.
Contract Term Description	Type a description for the contract term. The field can be a maximum of 20 characters.

❏ Click **Save**.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Print	Click to print job contract table data. The following Job Contract Table options are displayed: **Current Tab Page** - prints only the tab page currently open. **Selected Code Tables** - displays the following Job Contract Table options: • Job Code Table • Contract Class Table • Contract Term Table • Contract Year Table • Extract ID Table • Termination Reason Table **All Code Tables** - prints all the Job/Contract tab pages. Select an option, and then click **OK** to view a copy of the report. Otherwise, click **Cancel** to return to the tab. Review the report.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.

Contract Year - HRS2500

Personnel > Tables > Job/Contract > Contract Year

This tab is used to create and maintain the codes used to manage employee contract information on the Staff Job/Pay Data > Employment Info tab.

Note: The CYR or NYR Contract Year page is displayed depending on the payroll logon.

Set up contract year codes:

❑ Click **+Add** to add a row.

Field	Description
Contract Year Code	Type a code to identify the contract year. The field can be a maximum of two characters.
Contract Year Description	Type a description for the contract year. The field can be a maximum of 20 characters.

❑ Click **Save**.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Print	Click to print job contract table data. The following Job Contract Table options are displayed: **Current Tab Page** - prints only the tab page currently open. **Selected Code Tables** - displays the following Job Contract Table options: • Job Code Table • Contract Class Table • Contract Term Table • Contract Year Table • Extract ID Table • Termination Reason Table **All Code Tables** - prints all the Job/Contract tab pages. Select an option, and then click **OK** to view a copy of the report. Otherwise, click **Cancel** to return to the tab. Review the report.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.

Extract ID - HRS2500

Personnel > Tables > Job/Contract > Extract ID

This tab is used to create and maintain the codes used to tag employee records for a batch process (e.g., copy, extract, or mass update). If your LEA uses extract IDs to group employees, the extract IDs must be assigned to employee records on the Personnel > Maintenance > Employment Info tab.

Note: The CYR or NYR Extract ID page is displayed depending on the payroll logon.

Set up extract ID codes:

❏ Click **+Add** to add a row.

Field	Description
Extract ID	Type a code to identify the extract ID. The field can be a maximum of three digits.
Extract ID Description	Type a description for the extract ID. The field can be a maximum of 20 characters.

❏ Click **Save**.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Print	Click to print job contract table data. The following Job Contract Table options are displayed: **Current Tab Page** - prints only the tab page currently open. **Selected Code Tables** - displays the following Job Contract Table options: • Job Code Table • Contract Class Table • Contract Term Table • Contract Year Table • Extract ID Table • Termination Reason Table **All Code Tables** - prints all the Job/Contract tab pages. Select an option, and then click **OK** to view a copy of the report. Otherwise, click **Cancel** to return to the tab. Review the report.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.

Job Codes - HRS2500

Personnel > Tables > Job/Contract > Job Codes

This tab may be used for current or next year data depending on which menu option is selected, Job/Contract or Job/Contract NYR. This tab has the freeze pane functionality, which freezes the **Delete**, **Job Code**, and **Job Description** columns when using the horizontal scroll bar to scroll left and right to reveal additional columns.

This tab is an LEA-defined table used to identify each of the jobs at an LEA. Every employee at the LEA must have a job code including substitute employees. The data in this table is accessed on the Maintenance > Staff/Job Pay Data > Job Info and Distributions tabs to identify the specific job or jobs assigned to a particular employee and populate the **EEOC Code**, **Account Code**, and **Salary Concept** fields. Each job selected from this tab on the Job Info page must have separate contract and distribution information completed. You can also use this tab to set up extra duty jobs such as a librarian stipend, counselor stipend, and others where you want to maintain a separate contract amount and enable the employee to be paid whenever a payroll is processed without having to create an extra duty transmittal. Each job listed on the Job Info tab displays separately on the Payroll > Utilities > Payroll Simulation > Addendum tab.

When creating or updating this table, think about the level of detail to include when identifying jobs. For example, you can have a Teacher or Elementary Teacher as a job or detail such as 1st Grade Teacher, 2nd Grade Teacher, and so on. The more detailed the information, the greater the maintenance required when employees change positions, such as 1st Grade Teacher to 2nd Grade Teacher.

PMIS Notes:

- If you are logged on to the current year (CYR) and a job code is being used in the CYR PMIS records (current year (C) regardless of the school year), the pay concept cannot be changed. If the workers' compensation code is changed, all CYR PMIS records including distributions are updated. If the EEOC is changed, all CYR PMIS records are updated.
- If you are logged on to the next year (NYR) and a job code is being used in the forecast (NYR) PMIS records (next year (N) regardless of the school year), the pay concept cannot be changed. If the workers' compensation code is changed, all NYR PMIS records including distributions are updated. If the EEOC is changed, all NYR PMIS records are updated.

Add a job code:

❑ Click **+Add** to add a row.

Field	Description
Job Code	Type a job code to identify the job. The field can be a maximum of four characters (e.g., 0001 = Superintendent, 1003 = 10 month - 3rd Grade Teacher).
Job Description	Type a description for the job code. The field can be a maximum of 20 characters.
EEOC Code	Click ⌄ to select an equal employment opportunity code.

Field	Description
Account Code	Type the account number, or click ⁝ to select an account code from the Account Codes lookup. Click ⁝ in each field of the lookup to select the appropriate account code components. • Click **Search** to display a list of account codes matching the entered components. • In the **Search** field, type the account code or description to narrow the displayed results. • Click the account code link to return to the Job Codes tab and populate the **Account Code** field. **Note**: When the user is logged on to the current payroll files, the account code validation occurs against the Finance chart of accounts. If the user is logged on to the next year payroll files, the account code validation occurs against the Budget tables.
Salary Concept	Click ⌄ to select the salary table to use. There are three separate salary concepts that are used to compute the employee's salary.
Increase Pay Step	Select to allow a job to be incremented through the mass update utility. By default, this field is selected.
FSP Salary Class Code	Click ⌄ to select the salary class to use. There are five separate FSP salary class codes: A - Administrator, C - Counselor, L - Librarian, N - Registered nurse, and T - Class teacher. This field is used for the FSP Staff Salary Report (HRS4450), which is a listing of all employees with a job title recognized in the Foundation School Program. Since the number of specific employees receiving a pay increase must be reported each month, the TEA mandated the FSP Staff Salary Report through 2005 legislative action. The report includes the $2,500 pay increase and full and part-time employees who were receiving $500.00 or $250.00, respectively.
Accrual Code	Type the one-alpha character accrual code (e.g., A-Z) to which the job code is assigned, or click ⁝ to select an accrual code from the Accrual Codes list.
Workers' Comp Code	Click ⌄ to select a specific workers' compensation code.
FTE Hrs	Type the number of weekly full-time equivalent (FTE) hours for the job code.
No FTE	Select to indicate that the job has no full-time equivalent (FTE) hours to report for TRS purposes. If selected, the **FTE Hrs** is set to zero on the TRS extract regardless of the values in the **FTE Hrs**, **Position**, **TRS Status**, **Employee**, and **Pay Type** fields.
Time Option	Click ⌄ to select the time option to be used for WorkJournal in EmployeePortal. • *A Attendance Only* - Select to allow the job code to be used in WorkJournal for attendance purposes only. Pay information **will not** be transferred to Payroll when the Import WorkJournal Requests utility is processed. • *C Clock Time* - Select to allow the job code to be used in WorkJournal for timesheet entries. Pay information will be transferred to Payroll when the Import WorkJournal Requests utility is processed. • *N None* - Select to exclude the job code from WorkJournal. If selected, employees will not be able to submit entries to the job code in EmployeePortal. This field must set to *A* or *C* to allow the job code to accept WorkJournal entries EmployeePortal.

Field	Description
Pay Type 2 Dock	Select to allow docks to be created for pay type 2 employees.
Auto Lunch	Indicate the amount of time (**in minutes**) for the employee's lunch period. If an employee creates a timesheet entry in WorkJournal for more than five hours for a job code with an auto lunch, that amount of time is automatically deducted from their total time for the selected job code on that work day. Valid values are 1-60.

❏ Click **Save**.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Print	Click to print job contract table data. The following Job Contract Table options are displayed: **Current Tab Page** - prints only the tab page currently open. **Selected Code Tables** - displays the following Job Contract Table options: • Job Code Table • Contract Class Table • Contract Term Table • Contract Year Table • Extract ID Table • Termination Reason Table **All Code Tables** - prints all the Job/Contract tab pages. Select an option, and then click **OK** to view a copy of the report. Otherwise, click **Cancel** to return to the tab. Review the report.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.

Termination Reason - HRS2500

Personnel > Tables > Job/Contract > Termination Reason

This tab is used to create and maintain the codes used to manage employee termination reason information on the Staff Job/Pay Data > Employment Info tab.

Note: The CYR or NYR Termination Reason page is displayed depending on the payroll logon.

Set up termination reason codes:

❑ Click **+Add** to add a row.

Field	Description
Reason	Type a code to identify the termination reason ID. The field can be a maximum of two digits.
Description	Type a description for the termination reason ID. The field can be a maximum of 50 characters.

❑ Click **Save**.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Print	Click to print job contract table data. The following Job Contract Table options are displayed: **Current Tab Page** - prints only the tab page currently open. **Selected Code Tables** - displays the following Job Contract Table options: • Job Code Table • Contract Class Table • Contract Term Table • Contract Year Table • Extract ID Table • Termination Reason Table **All Code Tables** - prints all the Job/Contract tab pages. Select an option, and then click **OK** to view a copy of the report. Otherwise, click **Cancel** to return to the tab. Review the report.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.

Salaries

Use the Table of Contents to access a page.

Extra Duty - HRS2300

Personnel > Tables > Salaries > Extra Duty

This tab has the freeze pane functionality, which freezes the **Delete**, **Code**, and **Description** columns when using the horizontal scroll bar to scroll left and right to reveal additional columns.

> This tab is a user-defined table used to establish the pay rates for part-time functions required at each campus or LEA.
>
> Extra Duty Account Type Notes

Retrieve existing extra duty rate data:

❑ Under **Records**, enter one of the following:

Field	Description
Pay Acty	Click ⌄ to select a pay activity from the drop-down list.
Wholly Sep	Click ⌄ to select from the drop-down list.

Note: To retrieve all extra duty data, leave the fields blank.

❑ Click **Retrieve**. The extra duty data is displayed.

Set up extra duty rate data:

Code	Type the two-character extra duty code.
Description	Type the name that best describes the code. The field can be a maximum of 16 characters.

Account Code	An edit mask allows you to type the full 20-digit account number, mask the organization code, or mask the whole account number. If the organization code is masked, then when extra duty is assigned to the employee, the organization code from the employee record would complete the code. If the entire code is masked, then when extra duty is assigned to the employee, a complete account code must be entered on the distribution record for the employee. **Note**: When the user is logged on to the current payroll files, the account code validation occurs against the Finance chart of accounts. Type an account code or click to display the Account Codes lookup. • To view a list of account code components, place the cursor in one of the account code component fields and click . • Type the applicable account code components or leave blank for all account codes and click **Search**. A list of available account code components is displayed. • Select an account code from the list. Otherwise, click **Cancel**. Click **OK** when selections are complete. The account code is added to the highlighted row on the Extra Duty tab. When this extra duty is added to the employee's record, the account code validates according to the note above.
Activity	Click ⌄ to select a PEIMS activity code and corresponding description.
Wholly Sep	Click ⌄ to select whether the extra duty salary is subject to the Above State Minimum Salary Calculations of the TRS 373 report. Notes
Exp 373	Click ⌄ to select whether the amount is to be distributed for Above State Base.
Acct Type	Click ⌄ to select from the list of account types that best identify the type of salary. This field is required and must be populated to save entries in the table. The account type cannot be changed if the extra duty code has already been used in the distribution history table. Notes
W/C Code	Click ⌄ to select the workers' compensation code.
Amount	Type the salary amount authorized for this extra duty assignment.
Include in Dock Rate	Select to include the extra duty amount when processing calculations. This is for G-type supplements only. S-type supplementals are "extra" and cannot be included in the dock rate.
TRS Position Cd	This field is only enabled if the **Acct Type** field is set to *S Supplemental pay*. Click ⌄ to select the TRS position code for the selected extra duty code. *01 - Professional staff* *02 - Teacher, librarian* *03 - Support staff* *04 - Bus driver* *05 - FT nurse/Counselor* *06- Peace Officers* *07 - Food service worker* *09 - Summer School*
Use for ST OT	Select to indicate that the extra duty code will use the standard overtime rate in WorkJournal. This field is only enabled for S-type extra duty codes and can only be selected for one S-type extra duty code.

Display in WJ	*(This field will be used in future development. Currently, only primary job codes are displayed in WorkJournal.)*
	Select to display the extra duty code in WorkJournal. This field is only enabled for G-type and S-type extra duty codes.

❏ Click **Save**.

Note: If you changed the workers' compensation code and the extra duty code has been applied to employees through the Pay Info tab and the account type for the extra duty code is S, a message box is displayed asking if you would like to update the employees' master pay distribution records. If you choose not to update the employees' records, only the table record is changed.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Print	Click to print the salary table data. The following salary table options are displayed: **Current Tab Page** - prints only the tab page currently open. **Selected Salary Tables** - displays the following Current Year Salary Table Selection options: Local Annual Hourly/Daily Extra Duty Fund to Grant State Minimum Substitute Midpoint **All Salary Tables** - prints all the Salaries tab pages. Select an option, and then click **OK** to view a copy of the report. Otherwise, click **Cancel** to return to the tab. Review the report.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.

Fund to Grant - HRS2300

Personnel > Tables > Salaries > Fund to Grant

This tab is used to link an account/budget fund to a grant code for employee salary distribution records.

Note: Although specific grant codes no longer have to be reported to TRS, the grant code must be assigned to the fund in order to calculate the associated district-paid benefit for the TRS 3 and TRS 489 reports. The percentage used is the **District Percent** column from the TRS Rates table. For additional information about reporting grant contributions, go to the TRS website at https://www.trs.texas.gov/ and select Reporting Employers.

The tab displays all existing funds, regardless if there is a grant code, to allow adding a grant code. Funds must exist in the following tables in order to display:

- Finance, Chart of Accounts
- Finance, Fund table

Retrieve existing fund to grant data:

❑ Under **Records**, enter the following:

Field	Description
Fund	Click ⌄ to select a specific fund code to be retrieved. Leave blank to retrieve all fund codes.

❑ Click **Retrieve**. The selected fund to grant data is displayed.

Set up fund to grant data:

TRS Grant Cd	Type a two-character TRS grant code. Enter two blank spaces in the field to remove a grant code from a fund.

❑ Click **Save**. The system checks that all fund/fiscal year codes exist in the chart of accounts and the Fund table. The system removes the TRS grant code from this display if the fund does not exist in the Fund table or in the chart of accounts. A message box displays the funds with grant codes being removed.

When you add, change, or remove a grant code from a fund, the following records are updated:

- Pay distribution records for active employees in the current year
- Supplemental transmittal records for active employees in the current year who have supplemental transmittals and pay dates that have not been processed, which includes overtime, coded absence deduction, or extra duty transmittals

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Print	Click to print the salary table data. The following salary table options are displayed: **Current Tab Page** - prints only the tab page currently open. **Selected Salary Tables** - displays the following Current Year Salary Table Selection options: Local Annual Hourly/Daily Extra Duty Fund to Grant State Minimum Substitute Midpoint **All Salary Tables** - prints all the Salaries tab pages. Select an option, and then click **OK** to view a copy of the report. Otherwise, click **Cancel** to return to the tab. Review the report.

Hourly/Daily - HRS2300

Personnel > Tables > Salaries > Hourly/Daily

This tab is used to automatically reference the correct hourly or daily salary for employees (based on their pay grade, pay step, max days employed, and local schedule). This table could be used for creation of salaries for those employees, such as teachers, paraprofessionals, maintenance, bus drivers, and other jobs as maintained by the district.

On the Job Codes table, this salary concept could then be attached to the applicable jobs. When the job is selected on the Job Info tab, the system automatically populates the **Daily Rate** field on that tab and can then calculate the base annual amount based on the number of days employed. In addition, when the Mass Update Salary Calculations feature is used, the system then uses this table to extract the correct salary information, perform calculations, and populate many fields on the Job Info tab.

You can create an LEA-defined, local schedule codes that are used to indicate separate pay schedules for professional and support staff with the same pay grade, pay step, and the maximum number of days employed. There is an optional field to indicate the estimated number of overtime hours allowed for this pay grade and step.

Retrieve existing hourly/daily rates:

❑ Under **Records**, enter one of the following:

Field	Description
Pay Grade	Click ⌄ to select a pay grade from the drop-down list.
Pay Step	Click ⌄ to select a pay step from the drop-down list.

Note: To retrieve all local annual salary data, leave the fields blank.

❑ Click **Retrieve**. The hourly/daily rate data is displayed.

Set up hourly/daily rate data:

❑ Click **+Add** to add a row.

Pay Grade	Type the three-character code for the pay grade.
Pay Step	Type the two-character code for the salary level within the indicated pay grade.
Hrs Per Day	Type the number of hours per day an employee would work in a day. Leave blank and the Rate Type field defaults to Daily. Hours per day is required if performing hourly calculations.
Rate Type	If the **Hrs Per Day** field is left blank, the rate type is set to the daily rate. If the **Hrs Per Day** field contains hours, the rate type changes to the hourly rate.

Local Sched	Type the optional, locally assigned, single-character code that is used to indicate the separate pay schedules for professional and support staff with the same pay grade, pay step, and maximum number of days employed.
Pay Type	Click ⌄ to select the one-digit code that best describes how the employee's pay is calculated by the system.
	Pay type 1 employees are generally those employees that are under contract such as superintendents, principals, teachers, etc. (exempt employees under FLSA) whose pay rate remains constant during the course of their contract.
	Pay type 2 employees are generally paraprofessional, auxiliary, or clerical (nonexempt employees under FLSA) whose pay rate usually remains constant during the course of the year but are eligible for overtime.
	Pay type 3 employees are hourly employees (nonexempt under FLSA) who are paid only when hours are earned, so their pay rate fluctuates every pay date.
	Pay type 4 employees are substitutes that are paid at either an hourly or daily rate of pay and only when they work. **Note**: If **Use PMIS** is selected on the District Administration > Options > PMIS District Options page, the **Pay Type** field is required.
Est Ovtm Hrs	Type the estimated annual number of overtime hours allowed for this pay grade and step. This field is also used for next year interface to budget calculations.
Amount	Type the hourly/daily salary amount authorized for this pay grade and step. The field can be a maximum of six digits.

❏ Click **Save**.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Print	Click to print the salary table data. The following salary table options are displayed: **Current Tab Page** - prints only the tab page currently open. **Selected Salary Tables** - displays the following Current Year Salary Table Selection options: Local Annual Hourly/Daily Extra Duty Fund to Grant State Minimum Substitute Midpoint **All Salary Tables** - prints all the Salaries tab pages. Select an option, and then click **OK** to view a copy of the report. Otherwise, click **Cancel** to return to the tab. Review the report.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.

Local Annual - HRS2300

Personnel > Tables > Salaries > Local Annual

This tab is used to automatically reference the correct annual salary for employees, based on their pay grade, pay step, max days employed, and local schedule code. This table could be used for creation of salaries for those employees, such as teaching staff, whose pay is based on an annual amount with step increases for years of service.

On the Job Codes table, this salary concept could then be attached to the applicable job(s). When the job is selected on the Job Info tab, the system populates the **Base Annual** field automatically in the **Daily Rate** section on that page and can calculate the daily rate based on the number of days employed. In addition, when the Mass Update Salary Calculations feature is used, the system uses this table to extract the correct salary information, perform calculations, and populate many fields on the Job Info tab.

Retrieve existing local annual salary data:

❑ Under **Records**, enter one of the following:

Field	Description
Pay Grade	Click ⌄ to select a pay grade from the drop-down list.
Pay Step	Click ⌄ to select a pay step from the drop-down list.

Note: To retrieve all local annual salary data, leave the fields blank.

❑ Click **Retrieve**. The local annual salary data is displayed.

Set up local annual salary data:

❑ Click **+Add** to add a row.

Pay Grade	Type the three-character code for the pay grade.
Pay Step	Type the two-character code for the salary level within the indicated pay grade.
Max Days Employed	Type the maximum number of days worked at the indicated pay grade and pay step. The field can be a maximum of three characters.
Local Sched	Type the optional, locally assigned, single-character code that is used to indicate the separate pay schedules for professional and support staff with the same pay grade, pay step, and maximum number of days employed.
Annual Amt	Type the annual salary amount for this pay grade and step. The maximum annual amount is 9,999,999.99.

❑ Click **Save**.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Print	Click to print the salary table data. The following salary table options are displayed: **Current Tab Page** - prints only the tab page currently open. **Selected Salary Tables** - displays the following Current Year Salary Table Selection options: Local Annual Hourly/Daily Extra Duty Fund to Grant State Minimum Substitute Midpoint **All Salary Tables** - prints all the Salaries tab pages. Select an option, and then click **OK** to view a copy of the report. Otherwise, click **Cancel** to return to the tab. Review the report.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.

Midpoint - HRS2300

Personnel > Tables > Salaries > Midpoint

This tab is used to manage the pay rates for hourly, noncontract employees, and contract employees not covered under the annual or hourly/daily salary tables.

Midpoint Salary Schedule

Retrieve existing midpoint data:

❏ Under **Records**, enter one of the following:

Field	Description
Pay Grade	Click ⌄ to select a pay grade from the drop-down list.
Pay Type	Click ⌄ to select a pay step from the drop-down list. Leave the fields blank to retrieve all midpoint salary data.

❏ Click **Retrieve**. The midpoint salary data is displayed.

Set up midpoint data:

❏ Click **+Add** to add a row.

Pay Grade	Type the locally assigned, three-character code for the pay grade.
Pay Type	Click ⌄ to select a pay type code.
Minimum	Type the lowest pay rate for this pay grade/pay type.
Maximum	Type the highest pay rate for this pay grade/pay type.
Midpoint	The midpoint is automatically calculated. How is midpoint calculated?
Hours	Type the number of hours authorized for this pay grade. When pay types 1, 2, and 4 are calculated as daily rates, the **Hours** field is left blank. When pay type 3 is calculated as an hourly pay rate, the **Hours** field requires a value. **Note**: If there is data in the **Hours** field, the **Hrs/Day** field on the Job Info tab will also be populated. The **Hrs/Day** field can be modified on the Job Info tab, if necessary.
Dock Rate	Click ⌄ to select a dock rate (*D - Daily* or *H - Hourly*).

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.

Print	Click to print the salary table data. The following salary table options are displayed: **Current Tab Page** - prints only the tab page currently open. **Selected Salary Tables** - displays the following Current Year Salary Table Selection options: Local Annual Hourly/Daily Extra Duty Fund to Grant State Minimum Substitute Midpoint **All Salary Tables** - prints all the Salaries tab pages. Select an option, and then click **OK** to view a copy of the report. Otherwise, click **Cancel** to return to the tab. Review the report.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.

State Minimum - HRS2300

Personnel > Tables > Salaries > State Minimum

This tab is used to calculate the monthly state minimum salary for eligible district employees. For the latest TRS State Minimum Salary requirements, visit the TRS website at https://www.trs.texas.gov/Pages/Homepage.aspx, click the Reporting Entities menu, select Payroll Manual (Public Schools) and click State Minimum Salary Schedules from the Table of Contents.

Retrieve existing state minimum salary data:

❑ Under **Records**, enter the following:

Field	Description
State Step	Click ⌄ to select a state step from the drop-down list. Leave the field blank to retrieve all state minimum salary data.

❑ Click **Retrieve**. The state minimum data is displayed.

Note: Step codes and associated pay rates are provided by TEA. These must be manually entered when the system is being set up. The highest step for Instructor/Librarian/Counselor/Nurse is 20.

Set up state minimum data:

❑ Click **+Add** to add a row.

Step	Type the two-character code for the salary level within the indicated pay grade.
TEA Base	Type the daily pay rate for this step from the TEA provided table.
A 000-187	Type the daily pay rate for this step from the TEA provided table.
B 202-206	Type the daily pay rate for this step from the TEA provided table.
C 207-219	Type the daily pay rate for this step from the TEA provided table.
D 220-225	Type the daily pay rate for this step from the TEA provided table.
E 226+	Type the daily pay rate for this step from the TEA provided table.

❑ Click **Save**.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.

Print	Click to print the salary table data. The following salary table options are displayed: **Current Tab Page** - prints only the tab page currently open. **Selected Salary Tables** - displays the following Current Year Salary Table Selection options: Local Annual Hourly/Daily Extra Duty Fund to Grant State Minimum Substitute Midpoint **All Salary Tables** - prints all the Salaries tab pages. Select an option, and then click **OK** to view a copy of the report. Otherwise, click **Cancel** to return to the tab. Review the report.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.

Substitute - HRS2300

Personnel > Tables > Salaries > Substitute

This tab uses the time code descriptions and pay amounts to automate posting of employee substitutes. Once these fields are completed, you can indicate the time worked by a substitute employee by entering only the code in the transmittal for Employee Substitute entries. The system references the descriptions and amounts.

Retrieve existing substitute data:

❏ Under **Records**, enter one of the following:

Field	Description
Sub Type	Click ⌄ to select a substitute type from the drop-down list.
Time of Day	Click ⌄ to select a time of day from the drop-down list. Leave the fields blank to retrieve all substitute data.

❏ Click **Retrieve**. The substitute data is displayed.

Set up substitute data:

❏ Click **Sub Types** to display the Substitute Type Codes lookup with the existing substitute type codes.

Sub Type	Click ⌄ to select a substitute code and description. This field is used to distinguish pay differentials for substitutes employed by the district based on certification, degree, etc. The substitute type description is displayed in the **Sub Description** field.
Time	Type the single-character code for the time code (e.g., A = 7:30-3:30, B = 12:00-3:30). This is a required field.
Time Description	Type the name for the time code.
Leave Units	Type the number of employee leave units (hours or days) to represent any given number of substitute units (**Sub Units**). The leave units allow the employee to take leave in different units versus how a substitute is paid. When a record is added on the Maintenance > Leave Account Transaction > Employee Substitute tab, this number is automatically populated to the **Leave Used** field when the **Sub Type** is selected. In addition, the **Sub Units** and **Sub Pay Amt** fields from this tab are automatically populated on the Employee Substitute tab. **Example**: An employee takes 1 unit (day) of leave, but the substitute is paid by the hour; therefore, is paid 8 units or 8 hours in relation to the employee's leave of 1 unit (day).

Sub Units	Type the number of hours per day that position is authorized to work. This is a required field.
Sub Pay Amt	Type the pay rate allowed for this position.

❑ Click **Save**.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Print	Click to print the salary table data. The following salary table options are displayed: **Current Tab Page** - prints only the tab page currently open. **Selected Salary Tables** - displays the following Current Year Salary Table Selection options: Local Annual Hourly/Daily Extra Duty Fund to Grant State Minimum Substitute Midpoint **All Salary Tables** - prints all the Salaries tab pages. Select an option, and then click **OK** to view a copy of the report. Otherwise, click **Cancel** to return to the tab. Review the report.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.

Salaries, Next Year

Use the Table of Contents to access a page.

Extra Duty, Next Year - HRS4200

Personnel > Tables > Salaries NYR > Extra Duty

This tab has the freeze pane functionality, which freezes the **Delete**, **Code**, and **Description** columns when using the horizontal scroll bar to scroll left and right to reveal additional columns.

This tab is a user-defined table and is used to establish the pay rates for part-time functions required at each campus or LEA.

Retrieve existing extra duty rate data:

❑ Under **Records**, enter one of the following:

Field	Description
Pay Acty	Click ⌄ to select a pay activity from the drop-down list.
Wholly Sep	Click ⌄ to select from the drop-down list.

Note: To retrieve all extra duty data, leave the fields blank.

❑ Click **Retrieve**. The extra duty data is displayed.

❑ Under **Modify**, select either of the following criteria to modify extra duty pay rates:

- **By Percent**
- **By Dollar Amt**

❑ Under **Salary**, in the **Amount** field, type the percentage or dollar amount each row will increase by.

❑ Click **Default** to apply the amount entered in the **Amount** field to the **New Amount** field in each row.

Note: Only those rows that have no value (e.g., 0.00) in the **% Increase** or **$ Increase** columns are affected when applying the default values.

Set up extra duty rate data:

Code	Type the two-character extra duty code.
Description	Type the name that best describes the code. The field can be a maximum of 16 characters.

Account Code	An edit mask allows you to type the full 20-digit account number, mask the organization code, or mask the whole account number. If the organization code is masked, then when extra duty is assigned to the employee, the organization code from the employee record would complete the code. If the entire code is masked, then when extra duty is assigned to the employee, a complete account code must be entered on the distribution record for the employee. **Note**: When the user is logged on to the current payroll files, the account code validation occurs against the Finance chart of accounts. Type an account code or click ⋮ to display the Account Codes lookup. • To view a list of account code components, place the cursor in one of the account code component fields and click ⋮. • Type the applicable account code components or leave blank for all account codes and click **Search**. A list of available account code components is displayed. • Select an account code from the list. Otherwise, click **Cancel**. Click **OK** when selections are complete. The account code is added to the highlighted row on the Extra Duty tab. When this extra duty is added to the employee's record, the account code validates according to the note above.
Activity	Click ⌄ to select a PEIMS activity code and corresponding description.
Wholly Sep	Click ⌄ to select whether the extra duty salary is subject to the Above State Minimum Salary Calculations of the TRS 373 report.
Exp 373	Click ⌄ to select whether the amount is to be distributed for Above State Base.
Acct Type	Click ⌄ to select from the list of account types that best identify the type of salary. This field is required and must be populated to save entries in the table. The account type cannot be changed if the extra duty code has already been used in the distribution history table. Notes
W/C Code	Click ⌄ to select the workers' compensation code.
Include in Dock Rate	Select to include the extra duty amount when processing calculations. This is for G-type supplements only. S-type supplementals are "extra" and cannot be included in the dock rate.
TRS Position Cd	This field is only enabled if the **Acct Type** field is set to *S Supplemental pay*. Click ⌄ to select the TRS position code for the selected extra duty code. *01 - Professional staff* *02 - Teacher, librarian* *03 - Support staff* *04 - Bus driver* *05 - FT nurse/Counselor* *06- Peace Officers* *07 - Food service worker* *09 - Summer School*
Use for ST OT	Select to indicate that the extra duty code will use the standard overtime rate in WorkJournal. This field is only enabled for S-type extra duty codes and can only be selected for one S-type extra duty code.

Display in WJ	*(This field will be used in future development. Currently, only primary job codes are displayed in WorkJournal.)*
	Select to display the extra duty code in WorkJournal. This field is only enabled for G-type and S-type extra duty codes.
Amount	Type the salary amount authorized for this extra duty assignment.
% Increase	Type the percentage or dollar amount the row will increase by.
New Amount	Type the dollar amount the row will increase by.

❑ Click **Save**.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Print	Click to print the salary table data. The following salary table options are displayed: **Current Tab Page** - prints only the tab page currently open. **Selected Salary Tables** - displays the following Current Year Salary Table Selection options: Local Annual Hourly/Daily Extra Duty Fund to Grant State Minimum Substitute Midpoint **All Salary Tables** - prints all the Salaries tab pages. Select an option, and then click **OK** to view a copy of the report. Otherwise, click **Cancel** to return to the tab. Review the report.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.

Hourly/Daily, Next Year - HRS2300

Personnel > Tables > Salaries NYR > Hourly/Daily

This tab is used to automatically reference the correct hourly or daily salary for employees (based on their pay grade, pay step, max days employed, and local schedule). This table could be used for creation of salaries for those employees, such as teachers, paraprofessionals, maintenance, bus drivers, and other jobs as maintained by the district.

On the Job Codes table, this salary concept could then be attached to the applicable jobs. When the job is selected on the Job Info tab, the system automatically populates the **Daily Rate** field on that tab and can then calculate the base annual amount based on the number of days employed. In addition, when the Mass Update Salary Calculations feature is used, the system then uses this table to extract the correct salary information, perform calculations, and populate many fields on the Job Info tab.

You can create district-defined, local schedule codes that are used to indicate separate pay schedules for professional and support staff with the same pay grade, pay step, and maximum number of days employed. There is an optional field to indicate the estimated number of overtime hours allowed for this pay grade and step.

Retrieve existing hourly/daily rates:

❑ Under **Records**, enter one of the following:

Field	Description
Pay Grade	Click ⌄ to select a pay grade from the drop-down list.
Pay Step	Click ⌄ to select a pay step from the drop-down list.

Note: To retrieve all local annual salary data, leave the fields blank.

❑ Click **Retrieve**. The hourly/daily rate data is displayed.

Set up hourly/daily rate data:

❑ Click **+Add** to add a row.

Pay Grade	Type the three-character code for the pay grade.
Pay Step	Type the two-character code for the salary level within the indicated pay grade.
Hrs Per Day	Type the number of hours per day an employee would work in a day. Leave blank and the Rate Type field defaults to Daily. Hours per day is required if performing hourly calculations.
Rate Type	If the **Hrs Per Day** field is left blank, the rate type is set to the daily rate. If the **Hrs Per Day** field contains hours, the rate type changes to the hourly rate.

Local Sched	Type the optional, locally assigned, single-character code that is used to indicate the separate pay schedules for professional and support staff with the same pay grade, pay step, and maximum number of days employed.
Pay Type	Click ⌄ to select the one-digit code that best describes how the employee's pay is calculated by the system. Pay type 1 employees are generally those employees that are under contract such as superintendents, principals, teachers, etc. (exempt employees under FLSA) whose pay rate remains constant during the course of their contract. Pay type 2 employees are generally paraprofessional, auxiliary, or clerical (nonexempt employees under FLSA) whose pay rate usually remains constant during the course of the year but are eligible for overtime. Pay type 3 employees are hourly employees (nonexempt under FLSA) who are paid only when hours are earned, so their pay rate fluctuates every pay date. Pay type 4 employees are substitutes that are paid at either an hourly or daily rate of pay and only when they work. **Note**: If **Use PMIS** is selected on the District Administration > Options > PMIS District Options page, the **Pay Type** field is required.
Est Ovtm Hrs	Type the estimated annual number of overtime hours allowed for this pay grade and step. This field is also used for next year interface to budget calculations.
Amount	Type the hourly/daily salary amount authorized for this pay grade and step. The field can be a maximum of six digits.

❑ Click **Save**.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Print	Click to print the salary table data. The following salary table options are displayed: **Current Tab Page** - prints only the tab page currently open. **Selected Salary Tables** - displays the following Current Year Salary Table Selection options: Local Annual Hourly/Daily Extra Duty Fund to Grant State Minimum Substitute Midpoint **All Salary Tables** - prints all the Salaries tab pages. Select an option, and then click **OK** to view a copy of the report. Otherwise, click **Cancel** to return to the tab. Review the report.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.

Local Annual, Next Year - HRS2300

Personnel > Tables > Salaries NYR > Local Annual

This tab is used to automatically reference the correct annual salary for employees, based on their pay grade, pay step, max days employed, and local schedule code. This table could be used for creation of salaries for those employees, such as teaching staff, whose pay is based on an annual amount with step increases for years of service.

On the Job Codes table, this salary concept could then be attached to the applicable job(s). When the job is selected on the Job Info tab, the system populates the **Base Annual** field automatically in the **Daily Rate** section on that page and can calculate the daily rate based on the number of days employed. In addition, when the Mass Update Salary Calculations feature is used, the system uses this table to extract the correct salary information, perform calculations, and populate many fields on the Job Info tab.

Retrieve existing local annual salary data:

❑ Under **Records**, enter one of the following:

Field	Description
Pay Grade	Click ⌄ to select a pay grade from the drop-down list.
Pay Step	Click ⌄ to select a pay step from the drop-down list.

Note: To retrieve all local annual salary data, leave the fields blank.

❑ Click **Retrieve**. The local annual salary data is displayed.

Set up local annual salary data:

❑ Click **+Add** to add a row.

Pay Grade	Type the three-character code for the pay grade.
Pay Step	Type the two-character code for the salary level within the indicated pay grade.
Max Days Employed	Type the maximum number of days worked at the indicated pay grade and pay step. The field can be a maximum of three characters.
Local Sched	Type the optional, locally assigned, single-character code that is used to indicate the separate pay schedules for professional and support staff with the same pay grade, pay step, and maximum number of days employed.
Annual Amt	Type the annual salary amount for this pay grade and step. The maximum annual amount is 9,999,999.99.

❑ Click **Save**.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Print	Click to print the salary table data. The following salary table options are displayed: **Current Tab Page** - prints only the tab page currently open. **Selected Salary Tables** - displays the following Current Year Salary Table Selection options: Local Annual Hourly/Daily Extra Duty Fund to Grant State Minimum Substitute Midpoint **All Salary Tables** - prints all the Salaries tab pages. Select an option, and then click **OK** to view a copy of the report. Otherwise, click **Cancel** to return to the tab. Review the report.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.

Midpoint, Next Year - HRS2300

Personnel > Tables > Salaries NYR > Midpoint

This tab is used to manage the pay rates for hourly, noncontract employees, and contract employees not covered under the annual or hourly/daily salary tables.

Midpoint Salary Schedule

Retrieve existing midpoint data:

❑ Under **Records**, enter one of the following:

Field	Description
Pay Grade	Click ⌄ to select a pay grade from the drop-down list.
Pay Type	Click ⌄ to select a pay step from the drop-down list. Leave the fields blank to retrieve all midpoint salary data.

❑ Click **Retrieve**. The midpoint salary data is displayed.

Set up midpoint data:

❑ Click **+Add** to add a row.

Pay Grade	Type the locally assigned, three-character code for the pay grade.
Pay Type	Click ⌄ to select a pay type code.
Minimum	Type the lowest pay rate for this pay grade/pay type.
Maximum	Type the highest pay rate for this pay grade/pay type.
Midpoint	The midpoint is automatically calculated. How is midpoint calculated?
Hours	Type the number of hours authorized for this pay grade. When pay types 1, 2, and 4 are calculated as daily rates, the **Hours** field is left blank. When pay type 3 is calculated as an hourly pay rate, the **Hours** field requires a value. **Note**: If there is data in the **Hours** field, the **Hrs/Day** field on the Job Info tab will also be populated. The **Hrs/Day** field can be modified on the Job Info tab, if necessary.
Dock Rate	Click ⌄ to select a dock rate (*D - Daily* or *H - Hourly*).

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.

Print	Click to print the salary table data. The following salary table options are displayed: **Current Tab Page** - prints only the tab page currently open. **Selected Salary Tables** - displays the following Current Year Salary Table Selection options: Local Annual Hourly/Daily Extra Duty Fund to Grant State Minimum Substitute Midpoint **All Salary Tables** - prints all the Salaries tab pages. Select an option, and then click **OK** to view a copy of the report. Otherwise, click **Cancel** to return to the tab. Review the report.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.

State Minimum, Next Year - HRS2300

Personnel > Tables > Salaries NYR > State Minimum

This tab is used to calculate the monthly state minimum salary for eligible district employees. For the latest TRS State Minimum Salary requirements, visit the TRS website at https://www.trs.texas.gov/Pages/Homepage.aspx, click the Reporting Entities menu, select Payroll Manual (Public Schools), and click State Minimum Salary Schedules from the Table of Contents.

Retrieve existing state minimum salary data:

❑ Under **Records**:

Field	Description
State Step	Click ⌄ to select a state step from the drop-down list. Leave the field blank to retrieve all state minimum salary data.

❑ Click **Retrieve**. The state minimum data is displayed.

Note: Step codes and associated pay rates are provided by TEA. These must be manually entered when the system is being set up. The highest step for Instructor/Librarian/Counselor/Nurse is 20.

Set up state minimum data:

❑ Click **+Add** to add a row.

Step	Type the two-character code for the salary level within the indicated pay grade.
TEA Base	Type the daily pay rate for this step from the TEA-provided table.
A 000-187	Type the daily pay rate for this step from the TEA-provided table.
B 202-206	Type the daily pay rate for this step from the TEA provided table.
C 207-219	Type the daily pay rate for this step from the TEA-provided table.
D 220-225	Type the daily pay rate for this step from the TEA-provided table.
E 226+	Type the daily pay rate for this step from the TEA-provided table.

❑ Click **Save**.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.

Print	Click to print the salary table data. The following salary table options are displayed:
	Current Tab Page - prints only the tab page currently open.
	Selected Salary Tables - displays the following Current Year Salary Table Selection options:
	Local Annual
	Hourly/Daily
	Extra Duty
	Fund to Grant
	State Minimum
	Substitute
	Midpoint
	All Salary Tables - prints all the Salaries tab pages.
	Select an option, and then click **OK** to view a copy of the report. Otherwise, click **Cancel** to return to the tab.
	Review the report.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved.
	Click **Save**.

Substitute, Next Year - HRS2300

Personnel > Tables > Salaries NYR > Substitute

This tab uses the time code descriptions and pay amounts to automate posting of employee substitutes. Once these fields are completed, you can indicate the time worked by a substitute employee by entering only the code in the transmittal for Employee Substitute entries. The system references the descriptions and amounts.

Retrieve existing substitute data:

❑ Under **Records**, enter one of the following:

Field	Description
Sub Type	Click ⌄ to select a substitute type from the drop-down list.
Time of Day	Click ⌄ to select a time of day from the drop-down list. Leave the fields blank to retrieve all substitute data.

❑ Click **Retrieve**. The substitute data is displayed.

Set up substitute data:

❑ Click the **Sub Types** button. The Substitute Type Codes lookup is displayed with the existing substitute type codes.

Sub Type	Click ⌄ to select a substitute code and description. This field is used to distinguish pay differentials for substitutes employed by the district based on certification, degree, etc. The substitute type description is displayed in the **Sub Description** field.
Time	Type the single-character code for the time code (e.g., A = 7:30-3:30, B = 12:00-3:30). This is a required field.
Time Description	Type the name for the time code.
Leave Units	Type the number of employee leave units (hours or days) to represent any given number of substitute units (**Sub Units**). The leave units allow the employee to take leave in different units versus how a substitute is paid. When a record is added on the Maintenance > Leave Account Transaction > Employee Substitute tab, this number is automatically populated to the **Leave Used** field when the **Sub Type** is selected. In addition, the **Sub Units** and **Sub Pay Amt** fields from this tab are automatically populated on the Employee Substitute tab. **Example**: An employee takes 1 unit (day) of leave, but the substitute is paid by the hour; therefore, is paid 8 units or 8 hours in relation to the employee's leave of 1 unit (day).

Sub Units	Type the number of hours per day that position is authorized to work. This is a required field.
Sub Pay Amt	Type the pay rate allowed for this position.

❑ Click **Save**.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.	
Print	Click to print the salary table data. The following salary table options are displayed: **Current Tab Page** - prints only the tab page currently open. **Selected Salary Tables** - displays the following Current Year Salary Table Selection options: Local Annual Hourly/Daily Extra Duty Fund to Grant State Minimum Substitute Midpoint **All Salary Tables** - prints all the Salaries tab pages. Select an option, and then click **OK** to view a copy of the report. Otherwise, click **Cancel** to return to the tab. Review the report.	
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.	

Workers' Compensation, Next Year - HRS4200

Personnel > Tables > Salaries NYR > Workers' Compensation

This tab is used to automatically calculate the correct next year workers' compensation premiums for all types of district employee records. The workers' compensation codes are set to the default A, B, C, D, E, and F, but can be changed to local preference. Code descriptions may also be replaced.

This tab is only available when logged on to the next year.

To retrieve existing workers' compensation data:

❏ Under **Records**:

Field	Description
W/C Code	Click ⌄ to select a specific workers' compensation code. By default, the field is set to *All* and all workers' compensation codes are displayed.

❏ Click **Retrieve**. The workers' compensation code data is displayed.

❏ Under **Modify**, select either of the following criteria to modify workers' compensation premiums:

- **By Percent**
- **By Dollar Amt**

❏ Under **Salary**:

Amount	Type the percentage or dollar amount each row will increase by.

❏ Click **Default** to apply the amount entered in the **Amount** field to the **New Net Rate** field in each row.

Note: Only those rows that have no value (e.g., 0.00) in the % Increase or $ Increase columns are affected when applying the default values.

To set up workers' compensation data for next year:

❏ Under **Modify**:

By Percent	By default, this field is selected to modify next year workers' compensation rates.

❑ Under **Salary**:

Amount	Type the percentage value to increase a salary.

❑ Click **Default**. All pay grades and steps receive this default pay increase.

❑ To add a row, click Add.

Code	Click to select a workers' compensation code.
Description	Type the locally assigned description for each code.

The system populates the **Net Rate** field with the rate assigned by the LEA's insurance carrier for each code from the Workers' Compensation CYR table.

% Increase	Type the increase value or click **Default** to add the value.
New Net Rate	Type the new amount for the workers' compensation code.

❑ Click **Calculate New Net Rate** to update the **Net Rate** fields.

❑ Click **Add** to add another row. Continue adding rows as needed.

❑ Click **Calculate New Net Rate** to update workers' compensation data if the rates are changed or if a new rate is added.

❑ Click **Save**.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Print	Click to print the salary table data. The following salary table options are displayed: **Current Tab Page** - prints only the tab page currently open. **Selected Salary Tables** - displays the following Current Year Salary Table Selection options: Local Annual Hourly/Daily Extra Duty Fund to Grant State Minimum Substitute Midpoint **All Salary Tables** - prints all the Salaries tab pages. Select an option, and then click **OK** to view a copy of the report. Otherwise, click **Cancel** to return to the tab. Review the report.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.

Workday Calendars

Use the Table of Contents to access a page.

Copy School Calendar - HRS2700

Personnel > Tables > Workday Calendars > Copy School Calendar

This tab allows you to reuse a previously created calendar.

Copy a school calendar:

❑ Under **Calendar Info**:

Field	Description
Frequency	Click ⌄ to select the pay frequency that you wish to copy. Only pay frequencies that have calendars are available in the drop-down list. CYR and NYR pay frequencies are included.
Calendar Code	Click ⌄ to select the calendar that you wish to copy. When you select a calendar code, the calendar information for the pay frequency is displayed below. Verify that this is the calendar you want to use.

The calendar information for a specific pay frequency is displayed. Pay frequencies that have established calendar options are displayed on the right side of the page. Pay frequencies for these calendars are denoted by a checkbox.

- A pay frequency with a checkbox outlined in red has a calendar already. If you select this pay frequency, the existing calendar is overwritten.
- A pay frequency with a plain checkbox has district options set up but no calendar.
- A pay frequency with no checkbox has no district options set up for the frequency.

❑ Click **+Add**.

Calendar Code	Type the two-character, locally assigned code (e.g., 01, A1) for the calendar.
Calendar Description	Type the description for the calendar (e.g., Administration, Bus Drivers). The field can be a maximum of 20 characters.

❑ Select the payroll frequency to which you want to copy the calendar.

Note: To copy an existing calendar from one pay frequency to another pay frequency within the same year (current or next), you do not need to insert a new row for the same calendar code. Select the frequency checkbox to which the calendar should be copied. The new **Calendar Code** and **Calendar Description** fields are disabled. The **Freq** field is cleared and a checkbox outlined in red is displayed for each pay frequency with a valid calendar.

❑ Click **Save**.

Other functions and features:

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

Delete School Calendar - HRS2700

Personnel > Tables > Workday Calendars > Delete School Calendar

This tab allows you to delete school calendars in the current and next year pay frequencies.

Delete a school calendar:

All existing calendars are listed.

Field	Description
Calendar Code	Displays the calendar code.
Calendar Description	Displays the calendar description.

❏ Under **Freq**, select the pay frequency for the calendar you want to delete. You can select multiple calendars to delete.

❏ Click **Save**.

- If there are no employees attached to the calendar in Job Info, the calendar will be deleted.
- If there are employees attached to the calendar in Job Info, a calendar monitor message is displayed indicating that job records are associated with the calendar code and frequency. The message will also indicate that the calendar code will not be deleted (from Job Info), but all days associated with the calendar will be deleted. A message is displayed to verify the deletion of the calendar days.

Other functions and features:

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

School Calendar - HRS2700

Personnel > Tables > Workday Calendars > School Calendar

This tab is used to create calendars to be used in automatically calculating the number of days employees will work when the contract begin and end dates are entered on the Staff Job/Pay Data > Job Info tab. The calendar displays the employee workdays, the start of school, in-service sessions, and holidays for the entire school year.

When creating a new calendar, all days between the begin and end dates, except the weekend dates that are defaulted to red, are assumed to be workdays. Days that are selected as holidays are deducted from the workdays, and in-service days are displayed separately from workdays. The number of workdays and the in-service days represents the total number of days employed. When creating school calendars for the first time, create the longest calendar (260 workdays) first, and then copy that calendar to create and modify subsequent calendars.

A list of all CYR and NYR calendars is displayed.

Set up the school calendar:

❑ Click 🔍 on a specific row to view an existing calendar.

❑ Click **+Add** to add a row.

Field	Description
Frequency	Type the one-character current or next year pay frequency.
Calendar Code	Type the two-character, locally assigned code (e.g., 01) for the calendar.
Calendar Description	Type the description for the calendar (e.g., Administration, Bus Drivers). The field can be a maximum of 20 characters.
Actual Workdays	Displays the actual workdays and is automatically populated.

❑ Click **Save**.

Start Year	Type the starting calendar year in the YYYY format.
Start Month	Type the starting calendar month in the MM format (e.g., 07 for July).

❑ Click **Set Calendar** to display the calendar. The calendar is rearranged to begin with the entered starting month.

❑ In the first month of the calendar, select the first day of school on the calendar. Then, under **Legend**, click **Begin Date**. The day on the calendar changes to the **Begin Date** legend color.

- Under **Workdays By Month**, the current total of workdays for each month is displayed. The first month of the legend corresponds with the first month of the school calendar.
- Under **Day Count**, the current total of each type of day (e.g., Holiday) is added to the calendar.
- Select holidays, in-service days, and workday exceptions for the appropriate months in the

school year. The **Workdays By Month** and **Day Count** sections are updated accordingly.

- In the last month of the calendar, select the end date, which represents the last working day for that calendar.

❏ Click **Save**.

Other functions and features:

🔍	Click to view an existing calendar.
Print	Click to print calendar data. The following Workday Calendar selections are displayed: In the drop down, select a calendar code to be included. **Specific School Calendar** - prints only the tab page currently open. **All School Calendars** - prints all the school calendars. **Accrual Calendar** - prints only the accrual calendar. **Print Colors** - prints calendars on a color printer. Select an option and click **OK** to view a copy of the report. Otherwise, click **Cancel** to return to the tab. Review the report.

WorkJournal

Use the Table of Contents to access a page.

Admin - HRS2960

Personnel > Tables > WorkJournal > Admin

This page is used to manage a list of WorkJournal admin users who have access to view timesheet details in ASCENDER EmployeePortal. At this time, this page does not function as intended. This will be corrected with future programming.

Notes:

- **It is recommended** that LEAs set up at least one admin per campus. For example, each campus could set up a payroll clerk to view timesheet details.
- Each campus can have multiple admin users; however, admin users cannot be assigned to multiple campuses.

Modify a record:

Field	Description
Employee Nbr	Begin typing the employee number. As you type the data, a drop-down list of corresponding data is displayed. Select an employee. Or, click ⋮ to perform a search in the Employees Directory. The **Employee Name** field is populated with the employee's name.
Employee Name	The employee name is populated based on the employee number selected in the **Employee Nbr** field.
Primary Campus	Type the employee's three-digit primary campus ID.
Primary Dept	Type the employee's one-character primary department code.

❑ Click **+Add** to add a row.

❑ Click **Save**.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Print	Click to print the report. The report opens in a separate window. Review the report.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.

Options - HRS2960

Personnel > Tables > WorkJournal > Options

This tab is used to manage WorkJournal settings in ASCENDER EmployeePortal. These settings allow the LEA to determine how employees enter their time based on the work week, time conversion table, and pay type.

Modify a record:

Field	Description
Work Week Start Day	Click ⌄ to select the beginning day of the work week. This day determines the day that the employee can select in the **Work Week Start Date** field in EmployeePortal. For example, if the selected day is Tuesday, then the employee can only select Tuesday dates when entering WorkJournal entries in EmployeePortal. • *Sunday* • *Monday* • *Tuesday* • *Wednesday* • *Thursday* • *Friday* • *Saturday* This day cannot be changed if there is at least one employee record in the employee WorkJournal time table.
Work Entry Cutoff Days	Type the number of cutoff days the employee has to enter a timesheet entry. Valid values are 0-30.
Reminder Days	Type the number of days before the cutoff day that an automated email message will be sent to employees as a reminder that they have yet to submit their timesheet entries. Valid values are 0-9.

❏ Under **Enable WorkJournal Time for Pay Types**:

Pay Type 2 Non-contracted Employee	Select to enable WorkJournal time tables for pay type 2 (non-contracted) employees.
Pay Type 3 Hourly Employee	Select to enable WorkJournal time tables for pay type 3 (hourly) employees.

❏ Under **Time Conversion**:

Frequency	Click ⌄ to select the pay frequency for which you want to set up a time conversion table. Depending on the selected pay frequency, the corresponding time conversion table is displayed. This field is read only if your LEA only uses one pay frequency to pay employees. Pay frequencies are set up on the District Administration > Tables > District Information > Payroll Frequencies tab.

❑ Click **+Add** to add a row.

Up to Minute	Type the number of minutes to represent a specific percentage of the day. Valid values are 1-60.
Percent of Hour	Type the percent of day to represent a specific number of minutes. Valid values are 1-100%.

❑ Click **Save**.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Print	Click to print the report. The report opens in a separate window. Review the report.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.

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