


# Extract Teacher Service Record - HRS7500

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This utility is used to extract information from stored employee data to create service records. The service record detail can then be accessed by school year on the Service Record tab. No labels are created and you can wait to print the employee service record until such time as the employee leaves the LEA. The TEA Teacher Service Record guidelines can be found on http://tea.texas.gov/Texas_Educators/Salary_and_Service_Record/Teacher_Salary_and_Service_Information/.

See Service Record Checklist.

**Notes**:

- If there are no employees that match the extract criteria, no service record is created, and the system issues the following message: “No Service Data Extracted.”
- The Service Record Extract extracts all job records; however, leave information applies only applies to the primary job.

## Extract service records:

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

| Field | Description |
|---|---|
| **Employee Nbr** | Type the employee number(s) to be included, separating multiple employee numbers with a comma (e.g., 5,76,3 = 000005, 000076, 000003) or click ⋮ to select one or more employee numbers. Otherwise, leave blank to include all employee numbers. |
| **Hours Per Day (if required)** | Type the number of hours worked each day if required. If the **Days/Hours** field is set to **Hours** on the Leave Type tab for either of the state leave codes selected on the District HR Options page, the leave hours are converted to days using the **Standard Hours per Workday** field on the District HR Options page or the **Hours Per Day** field on the Extract Teacher Service Record page. If **Hours Per Day** is populated, the field overrides the populated **Standard Hours per Workday** field on the District HR Options tab. To convert the hours into days, the standard hours per workday or hours per day are divided into the employees' leave balance amounts. When the service record is created, the number of days that resulted from the calculation is displayed.<br><br>**Example**: An employee has 27.0 hours on the Payroll > Maintenance > Staff Job/Pay Data > Leave Balance tab and the **Standard Hours per Workday** field has 8.0 hours on the District HR Options tab or in the **Hours Per Day** field, the extract creates a service record with 3.38 days. |
| **Update Leave Only** | Select to only update the leave balances for employees where the service record has been previously extracted. Only primary jobs are extracted. The leave on the existing service table row (matched by employee/job description) is replaced by the extracted leave for that employee/job. If an employee has multiple rows on the service record table with the same job description, only the row with the latest date-time stamp (DTS) and some value in any of the leave columns are updated. If the job is not a primary job, zeros are placed in all leave fields.<br><br>This feature is primarily used for employees with new contracts that begin in July or August and leave for the prior contract year was not posted before the service record was created.<br><br>**Example #1**: New contract began 07-01-2022 and the service record for the prior contract beginning 07-01-2021 was created. Leave from June was not reported and/or posted until July and/or August payroll. Therefore, leave balances need to be updated on the service record to accurately reflect the leave used and balance(s).<br><br>**Example #2**: An employee was paid off early, the service record was created, and later, it was discovered that the employee took leave that did not get posted prior to leaving the LEA. The LEA can either manually update the leave used and balances on the service record or update the employee's master leave record and re-extract using the **Update Leave Only** option. |
| **Contract Begin Dates** | Type the beginning and ending contract dates to be used during the extract process. These fields are optional.<br><br>If these dates are not used, all employees are extracted regardless if they were under contract for the most current school year. To narrow the data to only include employees under contract during the most current school year, type a beginning and ending contract date range. |

| Field | Description |
|---|---|
| **Payoff Dates** | Type the beginning and ending payoff dates to be used during the extract process. These fields are optional. If these dates are not used, all employees are extracted regardless if they were under contract for the most current school year. To narrow the data to only include employees under contract during the most current school year, type a beginning and ending payoff date range. To include all employees for the school year, it is recommended to enter a beginning date in September. However, if employees separated from the LEA in August for the current school year, a beginning September date will not include them. You will need to manually enter data or perform an individual extract on those employees. |
| **Nbr Days Employed** | Type the beginning and ending number of days to limit employee selection. Type the fewest and most number of days employed or in the contract from the Job Info tab to extract records for all employees within that range (e.g., 001-287). The system uses the **# of Days Empld** field on the Maintenance > Staff Job/Pay Data > Job Info tab and does not take consider the **Serv Rec Days Ded** field on the Leave Adjustment, Abs Ded, or Cd Abs Ded tabs.<br><br>**Example**: If an employee has 150 days in the **# of Days Empld** field on the Maintenance > Staff Job/Pay Data > Job Info tab and has 16.0 days in the **Serv Rec Days Ded** field on the Leave Account Transaction > Leave Adjustment tab, then enters 150 in the **From Nbr Days Employed** and **To Nbr Days Employed** fields, the employee extracts by the 150 days in the **# of Days Empld** field and the service record reflects 134 days (150 - 16 = 134). The employee is not extracted if 134 days is typed in the **From Nbr Days Employed** and **To Nbr Days Employed** fields. |
| **Non-Professional Years Experience** | Select **Total** or **In District**. If data exists in this field on the Maintenance > Staff Job/Pay Data > Employment Info tab, it is used to populate the service record as follows:<br><br>If the **TRS Member Pos** field is a 01, 02, or 05, the service record uses the **Total** field (under **Years Experience** in the **Professional** column on the Maintenance > Staff Job/Pay Data > Employment Info tab).<br><br>If the **TRS Member Pos** field is a 03, 04, 06, or 07:<br><br>If **Total** is selected, the service record uses the **Total** field (under **Years Experience** in the **Non-Professional** column on the Maintenance > Staff Job/Pay Data > Employment Info tab).<br><br>If **In District** is selected, the service record uses the **In District** field (under **Years Experience** in the **Non-Professional** column on the Maintenance > Staff Job/Pay Data > Employment Info tab). |
| **Notes** | Type a new note or modify an existing note. If anything was entered in the **Notes** field and the **Update Leave Only** option is selected, the **Notes** column contains the value in the **Notes** field appended to the end.<br><br>To view a list of existing notes, click the down arrow, up arrow, or SPACEBAR on the keyboard. |

❑ Click **Execute** to start the process. If you click **Execute**, the Teacher Service Records Extract Data Preview window is displayed with a list of employees who meet the selected criteria.

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

the following message is displayed:

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

When initially displayed, the **Delete** checkbox is not selected for each employee in the list. Leave the **Delete** checkbox blank for each employee for whom a row should be created. For each extracted employee marked as **New** for whom a row should not be created, select **Delete** to prevent those employees from being extracted. If employees have existing rows in the service record table, the page also displays those rows and they are not marked as **New**. Instead, the **New** column is blank and if **Delete** is selected, the row will be deleted from the service record table.

If multiple pay frequencies are selected and an employee exists on multiple pay frequencies, all jobs associated with the employee as well as any leave associated with the primary job in each frequency are displayed. The leave balances are not combined but are displayed individually for each primary job.

The **Nbr of Days Empld** field for the service record is based on the **Nbr of Days Empld** field on the Job Info tab for each job being extracted.

- If the employee has been docked for any leave day for any leave type (not just state-based leave types), the service record **Nbr of Days Empld** field will be reduced for the primary job.
- If the employee has any service record day adjustments reported on the Abs Ded or Cd Abs Ded transmittal tabs, those service record day adjustments are associated with the same job as used for the transmittal when calculating the service record **Nbr of Days Empld** field.
- If there are transmittals on the Abs Ded or Cd Abs Ded transmittal tabs for an employee where the job code for the transmittal no longer exists in the employee’s job master, the primary job service record days will be adjusted based on those transmittals.

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

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

**Example 1**: This employee was initially extracted with 14.00 days employed. The new row displays that the employee had 13.50 days employed. If the original (14.00 days) row is correct, select **Delete** for the new row. If the **New** row (13.50 days) is correct, then select **Delete** for the old (white) row.

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

The Rows Deleted Data Preview window is displayed. Review the report.

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

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

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

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

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

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


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